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October 30, 2025

Office of the U.S. Trade Representative  
Jamieson Greer  
U.S. Trade Representative  
600 17th St NW  
Washington, DC 20508

***Docket Number USTR-2025-0016: Request for Comments on Significant Foreign Trade Barriers for the 2026 National Trade Estimate Report***

Dear Ambassador Greer,

The Meat Institute appreciates the opportunity to submit comments to the Office of the U.S. Trade Representative (USTR) in response to Docket Number USTR-2025-0016, "Request for Comments on Significant Foreign Trade Barriers for the 2026 National Trade Estimate Report."

The Meat Institute is the United States' oldest and largest trade association representing packers and processors of beef, pork, lamb, veal, turkey, and processed meat products, and Meat Institute member companies account for more than 95% of U.S. output of these products. The Meat Institute provides legislative, regulatory, international affairs, public relations, technical, scientific, and educational services to the meat and poultry packing and processing industry.

The U.S. meat and poultry industry is the economic engine powering the agriculture sector. According to the U.S. Census Bureau, meat and poultry processing is a \$227.9 billion industry. Meat and poultry packers and processors employ more than 532,000 workers paying average hourly wages of \$22. The meat and poultry industry produces on average 27.95 billion pounds of beef, 27.67 billion pounds of pork, 53.2 million pounds of veal, 138.4 million pounds of lamb and mutton, and 50.4 billion pounds of poultry.<sup>1</sup> Based on USDA Economic Research Service trade multipliers, U.S. meat and poultry exports contribute additional export activity of more than \$44 billion,<sup>2</sup> supporting American workers, farm communities, producers, and companies along the meat and poultry supply chain.

The domestic U.S. meat and poultry industry's long-term economic viability, though, depends on robust international trade, particularly as domestic per capita consumption of meat and poultry remains stable, and 95% of consumers live outside the United States. International trade is, therefore, vital to the long-term strength of the U.S. meat and poultry industry, the American workers it supports, and the rural and farm communities it sustains. In 2024, U.S. meat and poultry exports exceeded \$24.6 billion.<sup>3</sup> Annually, approximately 14% of U.S. beef production, 15% of U.S. poultry production, and 25% of U.S. pork production are exported. According to a 2022

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<sup>1</sup> "Industry at a Glance," Meat Institute, accessed September 26, 2025, [https://www.meatinstitute.org/Industry\\_at\\_a\\_Glance](https://www.meatinstitute.org/Industry_at_a_Glance)

<sup>2</sup> "Agricultural Trade Multipliers," USDA Economic Research Service, USDA, updated July 2, 2025, <https://www.ers.usda.gov/data-products/agricultural-trade-multipliers>

<sup>3</sup> "GATS Home," USDA Foreign Agricultural Service, USDA, accessed September 28, 2025, <https://apps.fas.usda.gov/gats/default.aspx>

report published by the Economic Research Service, U.S. agricultural exports support 86,127 jobs in the beef industry, 52,999 jobs in the pork industry, and 45,855 jobs in the poultry industry.<sup>4</sup>

Exports add value to every animal produced and in turn increase demand for U.S. corn and soybeans. For example, on average, pork exports contribute \$64 in value to each hog that is marketed in the U.S. and U.S. beef exports yield more than \$400 in value per head of cattle. Consequently, the resilience of the U.S. meat and poultry industry is inextricably linked to U.S. trade policy and attendant initiatives that foster U.S. meat and poultry export growth. However, the industry's export potential remains limited by unjustified sanitary barriers, prohibitive tariffs and tariff rate quotas, and onerous registration and approval requirements for exporting facilities, among other impediments.

The Trump Administration's America First Trade Policy Agenda, though, has reinvigorated American trade policy and has demonstrated that it is capable of proactively addressing these unfounded barriers, which continue to proliferate, and which curtail U.S. meat and poultry export potential, while harming America's farmers, ranchers, and workers that produce the most nutritious, abundant, and efficient food supply in the world. In only a few short months, the Trump Administration has made progress in Europe, the United Kingdom, Southeast Asia, and other critical markets, and the Meat Institute welcomes the opportunity to continue to work with the Trump Administration to reassert American leadership to advance U.S. meat, poultry, food, and agriculture trade in a manner that revitalizes our farm communities and supports broad-based economic growth.

To that end, the ensuing comments identify key market access opportunities for the U.S. meat and poultry industry that align with President Trump's re-energized trade policy agenda and would benefit greatly from the Trump Administration's engagement following several years of America assuming a more diminished role in trade discussions.

### **China Continues to Renege on Commitments Made in the U.S.-China Phase One Agreement**

The Meat Institute appreciates President Trump's leadership to secure the U.S.- China Phase One Agreement (the Agreement) during his first term, which provided significant market access gains for the U.S. meat and poultry industry, including increasing the number of U.S. beef, pork, and poultry products and establishments approved for export to China, as well as reducing other non-tariff barriers precluding trade in these products. Barriers to trade, however, remain, including China's requirement that U.S. pork imports be accompanied by ractopamine-free certificates of analysis, even though all U.S. pork destined for China is being produced under ractopamine-free verification programs; China's zero-tolerance policy regarding pathogens on the surface of raw pork and beef imports; and China's ban on the use of Codex and Food and Drug Administration-approved beta agonists.

Alarming, the country's General Administration of Customs (GACC) has, since the Agreement's inception, suspended a number of U.S. beef export establishments for ractopamine findings. While GACC maintains a zero-tolerance policy for ractopamine in beef, Annex 7, provision 4 of the Agreement, provides, "if China determines, based on scientific inspection, that a particular shipment of U.S. meat or poultry products is in violation of applicable food safety import requirements, China may refuse importation of that shipment." However, the Agreement explicitly states that "a significant, sustained or recurring pattern of non-conformity with an applicable food safety measure" [ie. a ractopamine finding] must be established before China may refuse to accept

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<sup>4</sup> Monica Cordero, "Graphic: US agricultural exports support 1.25 million jobs," Investigate Midwest, November 6, 2024, <https://investigatemitwest.org/2024/11/06/graphic-us-agricultural-exports-support-1-25-million-jobs/>

shipments from an establishment – suspend a facility’s export eligibility.<sup>5</sup> In late 2024, China moved to suspend multiple additional U.S. export facilities, including a cold storage establishment. In each of these instances, U.S. beef export facilities were suspended upon their first ractopamine finding, not following a period of repeated violations, and each of the establishments subsequently reviewed and revised internal processes and controls to prevent recurrences. Yet, there remains no clear path to reinstating establishments suspended by GACC.

Annex 7 provision 5 of the Agreement, meanwhile, compels China to conduct, in consultation with U.S. experts, a risk assessment for ractopamine in cattle and swine without undue delay, and in a manner consistent both with “Codex and FAO/World Health Organization (WHO) Joint Expert Committee on Food Additives (JECFA) risk assessment guidance and with the risk assessment for ractopamine previously conducted by the FAO/WHO JECFA.” China, to date, has reneged on this commitment.<sup>6</sup>

Even more pernicious is China’s failure to renew U.S. beef export establishment eligibility in the country’s CIFER system, the online database that lists all eligible export facilities from countries that trade with China. This escalatory action directly violates the Agreement and has effectively closed the market to U.S. beef exports. Specifically, since March 2025, approximately 415 U.S. beef establishments remain ineligible to export to China, with more set to expire over the next several months and years. China’s CIFER system attaches five-year expiration dates to each eligible facility, but these artificial expiration dates should not impact U.S. export eligibility – U.S. establishments should remain eligible as long as the Food Safety and Inspection Service (FSIS) deems them so and they have not been suspended by China for any import violations.

Through the Agreement, China recognizes FSIS as the competent authority, where FSIS provides China with the U.S. meat and poultry establishments that are eligible to export to China. China is obligated to update its approved plant list within 20 days of receiving lists from the FSIS.<sup>7</sup> However, GACC has not been updating U.S. facility details since July 2024 – including administrative updates, like address changes – and although GACC has to date renewed the U.S. pork and poultry establishments that were set to expire in CIFER, they have, as discussed, unduly targeted the U.S. beef industry.

GACC’s dubious testing of U.S. beef products for melengestrol acetate (MGA), a synthetic progestin used as a feed additive to promote growth and suppress estrus (heat) in heifers, has only compounded the U.S. beef industry’s unjust treatment in the China market. Despite the Agreement setting maximum residue limits (MRLs) for MGA, China has only recently been finding violative detections and subsequently suspending U.S. beef establishments, which are already unable to send product to China due to the persistent above-mentioned facility expiration issue. As the U.S. beef industry works collaboratively to address the MGA issue and engages the U.S. government on solutions, it is imperative that USTR works to lift these suspensions because, similar to ractopamine, the Agreement disallows first-time MGA offense suspensions.

Specifically, and most urgently, U.S. beef producers and exporters would benefit from the restoration of all expired U.S. beef establishments in China’s CIFER system and a more permanent solution to prevent future protracted plant renewal issues. Concurrently, a path to reinstating suspended U.S. meat facilities due to ractopamine and MGA is vital to ensure renewed establishments avail themselves of export opportunities without fear of being permanently barred from China. The economic imperative for achieving both objectives is clear: U.S. beef exports to China add approximately \$150-\$165 per head to the value of cattle, but with the market

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<sup>5</sup> “United States-China Phase One Agreement,” Office of the U.S. Trade Representative, accessed September 27, 2025, <https://ustr.gov/phase-one>

<sup>6</sup> Ibid.

<sup>7</sup> Ibid.

essentially closed to U.S. beef, American farmers and ranchers, as well as U.S. companies in the beef value chain, are being denied crucial revenue. At the time of this writing, in total, the U.S. beef industry stands to lose between \$3.7 to \$4.13 billion as long as establishment expirations remain in effect.<sup>8</sup> Meanwhile, the \$1.6 billion in U.S. beef exports to China in 2024 supported more than 14,000 American jobs, which are now at risk as no U.S. beef is expected to ship to China until the foregoing issues are resolved. Simultaneously, countries like Brazil and Australia are filling the void left by U.S. exporters, with Chinese customers now replacing U.S.-sourced beef with Australian grain-fed beef. Once a market is lost, it can take decades for companies to rebuild the customer relationships and regain the access they once enjoyed. For U.S. beef exporters, there are not alternative markets that could absorb the products shipped to China, particularly beef offal, at comparable premiums. This will shift products to rendering, yielding deleterious consequences for the American farm economy, ranging from depressed wages, fewer jobs, and shuttered companies, stifling long-term growth potential for American farmers, ranchers, and exporters.

Moreover, 42 states are currently banned from exporting poultry to China due to highly pathogenic avian influenza (HPAI) restrictions. However, many of those states meet the requirements to have restrictions lifted, yet China has refused to approve new facilities located in those states to be eligible to ship product. In short, the Government of China has not followed a previously signed HPAI protocol that would release HPAI restrictions on states after 90 days resulting in indefinite state-level restrictions. Reinstating these states' export eligibility is a top priority for the U.S. poultry industry. China, for instance, is the primary market for U.S. chicken paws and wing tips, and without Chinese demand for these products, U.S. companies are forced to sell feet and paws to renderers for a few cents per pound.

GACC's consistent, overt disregard for the provisions in the Agreement is undermining U.S. meat and poultry exports to China and adds arbitrary, capricious complexity to the export process. It is clear China has not adequately implemented the Agreement and has frequently acted in direct defiance of its obligations to the detriment of U.S. meat and poultry exporters who have benefitted from its entry into force, but whose export potential remains constrained by GACC's selective, nefarious application of the Agreement's provisions.

The Meat Institute is pleased to see the seriousness with which the Trump Administration is addressing the aforementioned challenges. Ensuring, through sustained bilateral engagement, that China complies with and enforces all provisions in the Agreement, including those pertaining to establishment registration, presents the second Trump Administration with an important opportunity to strengthen the Agreement's landmark achievements on agriculture in defense of American farmers, ranchers, and meat and poultry companies so that the Agreement's intended gains can be fully realized.

### **China's Retaliatory Tariffs on U.S. Meat Exports Constrain Growth**

It is equally evident that China's Section 232 and 301 retaliatory tariffs that remain on U.S. meat exports further undermine U.S. market access and violate the spirit of the Agreement. Continuation of these tariffs by the Chinese government jeopardizes the ability of U.S. meat exporters to access the China market on a level playing field. The U.S. industry has been forced to absorb the cost of China's retaliatory tariffs for the last several years, which returns lower profits for U.S. exporters compared to their competitors and risks nullifying progress the Administration is making to combat food inflation and hold China accountable to the Agreement's provisions.

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<sup>8</sup> "U.S. Pork Exports Rebounded in June; China's Lockout Weighed on Beef Results," U.S. Meat Export Federation, August 6, 2025, <https://www.usmef.org/news/u-s-pork-exports-rebounded-in-june-china-s-lockout-weighed-on-beef-results-1>

The Meat Institute recognizes the diversity of industries and sectors that are impacted by China's specious policies, and both welcomes and understands the Administration's interest in addressing those legitimate concerns. We respectfully encourage USTR to work to remove these tariffs that China erroneously levied on the U.S. agricultural sector and meat and poultry industry in retaliation for actions that have largely, and appropriately, targeted China's technology, intellectual property, national security, and manufacturing sectors, not its agricultural sector. Specifically, China's tariffs have undermined the export potential of U.S. pork and pork variety meats since their imposition. In March 2020, China subsequently implemented an exemption process for Section 301 retaliatory duties, which helped underpin growth in U.S. beef, poultry, and pork exports, though that exclusion process is set to expire this year.

China has announced it will not accept or approve new Section 301 tariff exclusion applications for U.S. meat and poultry products as of October 30, 2025, and existing approvals will expire after December 13, 2025.<sup>9</sup> This would effectively raise tariff rates on U.S. beef exports from 32% to 62% and on U.S. pork exports from 57% to 87%, although, as already described, most U.S. beef exports are currently shut out of the market. The pork tariff rate also includes a 25% Section 232 retaliatory tariff.

The consequences of persistent retaliation against U.S. pork exports to China are stark. In 2024, China was the third largest market for U.S. pork and pork variety meats, with exports valued at \$1.11 billion, supporting 7,000 American jobs. Importantly, China is the top market for U.S. pork variety meats, and no alternative market can import the volume of pork variety meats at the premium China pays. In fact, without China, the U.S. pork industry will be forced to render and landfill items, and, as a result, the per head loss for American pork producers is estimated in the range of \$8 to \$10, with total pork industry losses approaching \$1.04 billion to \$1.3 billion should the U.S. lose access to China.<sup>10</sup>

U.S. poultry exports to China will also be subject to higher tariff rates once Section 301 exclusions expire, including increases of 2.5% for heat treated paws, 10% for heat treated turkey products, and 30% for all other raw frozen poultry products. The tariff rates for U.S. cooked paws and raw paws/chicken parts would rise to 27.5% and 55%, respectively.

These tariffs not only make U.S. exporters of beef, poultry, and particularly pork, less competitive, but they also yield reduced prices for U.S. producers, packers, and processors along the supply chain, which translates to depressed wages for American workers and less revenue for communities that rely on agricultural trade. USTR, in coordination with the Departments of Agriculture, Commerce, and Treasury, could provide much needed relief to America's farmers, ranchers, and meat and poultry companies, if ongoing negotiations with China result in the elimination of all retaliatory tariffs on U.S. meat and poultry products. This will improve gains for and the competitiveness of the U.S. industry when facility expiration date and suspension issues are resolved concurrently.

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<sup>9</sup> "Trade Alert - China Extends Section 301 Tariff Exclusions," USDA Foreign Agricultural Service, August 1, 2025, [https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Trade%20Alert%20-%20China%20Extends%20Section%20301%20Tariff%20Exclusions\\_Beijing\\_China%20-%20People%27s%20Republic%20of\\_CH2025-0153](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Trade%20Alert%20-%20China%20Extends%20Section%20301%20Tariff%20Exclusions_Beijing_China%20-%20People%27s%20Republic%20of_CH2025-0153)

<sup>10</sup> "U.S. Pork Exports Rebounded in June; China's Lockout Weighed on Beef Results," U.S. Meat Export Federation, August 6, 2025, <https://www.usmef.org/news/u-s-pork-exports-rebounded-in-june-china-s-lockout-weighed-on-beef-results-1>

### **Despite Progress, Persistent Regulations Impede U.S. Beef and Pork Exports to Taiwan**

The Meat Institute welcomed in January 2021, Taiwan’s establishment of Codex MRLs for ractopamine residues in pork products, offering alignment with the standards it established for beef almost a decade earlier. However, Taiwan has not made available the required risk assessment examining ractopamine residue levels in pork and has implemented an onerous country-of-origin labeling regulation for imported pork that undermines the additional access granted to pork imports through the establishment of MRLs. This action is particularly discriminatory against U.S. pork, which has been the subject of sustained, widespread, negative media coverage, as these labels are required for all pork including items that are further processed. Both the risk assessment and labeling scheme require attention to ensure science-based trade principles are applied to U.S. pork exports to Taiwan and are not further impeded by unjustified technical barriers to trade.

In a positive development, in 2023, Taiwan opened its market to Canadian beef from cattle over thirty months of age (OTM). Despite this and other progress made, U.S. beef exporters must continue to participate in a USDA-AMS Export Verification Program to send product to Taiwan, which limits the commercial potential for U.S. beef exports destined for the Taiwanese market. Also, Taiwan continues to impose unfounded restrictions on access for ground beef, beef trimmings, and some offal products. In 2024, Taiwan was the U.S.’s sixth largest value market for beef and fifth largest value market for poultry, whereas pork exports fell 57% compared to the previous year, demonstrating the profound impact of Taiwan’s trade-inhibiting policies applied to U.S. pork imports.<sup>11</sup>

### **Opportunities to Access Growing Markets in Southeast Asia are Constrained by Persistent Trade Barriers**

Southeast Asia represents a growing, dynamic market for U.S. meat and poultry exports, with its rising population of middle class consumers. U.S. agricultural exports to Southeast Asia increased from \$9.4 to \$12.9 billion from 2012 to 2023, and the U.S. share of Southeast Asia’s agricultural imports has held steady near 11%, demonstrating robust growth potential.<sup>12</sup> Moreover, USDA forecasts that the region’s population will increase more than 7% over the next decade with GDP per capita rising by more than 40% over the same period, fueling meat and poultry consumption trends in the region. Securing international market access for U.S. agricultural products, including meat and poultry products, in this dynamic region is integral for American farm profitability.

Despite persistent tariff and non-tariff barriers that place U.S. meat and poultry products at a competitive disadvantage compared to products from China, Brazil, Australia, New Zealand, and the European Union, among others, engaging countries in the region – particularly Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam – is vitally important to enhance market diversification for U.S. agricultural goods. The Meat Institute commends the Trump Administration’s prioritization of this region in its initial engagement with trading partners aimed at achieving meaningful results to balance non-reciprocal trade arrangements through bilateral and sector-specific means. As USTR finalizes the text of agreements announced with the Philippines, Indonesia, Malaysia, Cambodia, Thailand, and Vietnam, and as it concludes additional frameworks across Southeast Asia, the Meat Institute respectfully submits that the most durable way to confront longstanding obstacles that have hindered U.S. meat and poultry trade in the region is through the implementation of binding, enforceable agreements with avenues to promote accountability and to resolve disputes when trading partners renege on core commitments.

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<sup>11</sup> “GATS Home,” USDA Foreign Agricultural Service, USDA, accessed September 28, 2025, <https://apps.fas.usda.gov/gats/default.aspx>

<sup>12</sup> “U.S. Agricultural Exports in Southeast Asia,” USDA Economic Research Service, August 6, 2024, <https://www.ers.usda.gov/publications/pub-details?pubid=109671>

For instance, many countries in Southeast Asia, including Indonesia, Vietnam, and Malaysia, among others, have adopted a cumbersome plant-by-plant approval process, not a systems-wide approach, as these countries have not historically recognized the equivalence of the robust U.S. meat inspection system for beef, pork, poultry, and lamb. For example, Indonesia requires exporters to submit a lengthy and detailed questionnaire and implements a complex document review process that has resulted in approval of only a few U.S. establishments. Also, Indonesia employs an import recommendation system, in which an importer requests an allocation of a specific volume of beef, which can be imported over the six-month recommendation period. Importers are required to meet a certain percentage of the requested volume or face penalties in future recommendation requests, which compounds other constraints facing U.S. beef exports to the country. Furthermore, Indonesia last year established a new halal authority, which has imposed additional burdensome halal documentation requirements on U.S. exporters. These restrictions have led to an overall decline in beef export value to Indonesia, falling from \$118 million in 2021 to \$92 million in 2024, though the latter figure represented slight growth compared to 2023.<sup>13</sup>

Thanks to the Trump Administration's diligent efforts, which resulted in the announcement of a groundbreaking Joint Framework Agreement on Reciprocal Trade (Framework) between the U.S. and Indonesia in July, most of the U.S. meat industry's aforementioned concerns are expected to be resolved. Significantly, the Framework addresses several of the key impediments the Meat Institute has encouraged the Administration to prioritize, including Indonesia's establishment approval process and its import licensing regime. Specifically, the Framework would exempt U.S. food and agricultural products from all of Indonesia's import licensing requirements, including its commodity balance policy; would implement a more transparent and fair system for geographical indications, including for products bearing common meat names; and would adopt a systems-based approach to facility registration by listing all federally approved U.S. meat and poultry establishments as eligible to export to Indonesia. The Meat Institute supports this precedent-setting Framework and encourages the Administration to expeditiously conclude and implement the final agreement with Indonesia to facilitate long overdue gains for American farmers, ranchers, and exporters.

The approval of additional U.S. beef facilities in Indonesia will have the most marked impact on the U.S. industry's ability to compete more fairly in the market, with export value projected to exceed \$160 million, and perhaps surpass \$270 million, depending on the extent of establishment approvals outlined in a final deal. No U.S. poultry companies are presently approved to export to Indonesia due to the country's nontransparent halal-certification process, which has made obtaining valid and reliable import certificates based on a limited number of accredited halal centers nearly impossible. Indonesian regulations limit poultry imports to whole (fresh or chilled) birds, fatty duck liver, and frozen other poultry (specialty products), but bars poultry parts. It is, therefore, indispensable that the U.S.'s trade deal with Indonesia terminates the country's opaque halal policies, erroneous product constraints, and restrictive establishment approval scheme. This is particularly urgent as competitors, like Brazil, are positioned to ship bone-in beef, offal, meat products, and prepared meats to the Indonesian market.

Vietnam's establishment registration process for U.S. beef, pork, and poultry facilities deteriorated in 2024, as the country failed to grant new establishment approvals and began requesting business-sensitive information from companies to determine export eligibility. Vietnam is also requiring companies to supply cumbersome product descriptions, which must match exactly the product listed on the 9060-5 export certificate, representing another regulatory departure that is unnecessarily burdensome and has injected more uncertainty into the export process. Also, the Philippines earlier this year announced a prenotification and electronic invoicing system that would introduce added costs, uncertainties, and redundancies for American exporters, particularly because FSIS onboarded the Philippines in the Public Health Information System in May 2025. Additional systems, processes,

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<sup>13</sup> "GATS Home," USDA Foreign Agricultural Service, USDA, accessed September 28, 2025, <https://apps.fas.usda.gov/gats/default.aspx>

and documentation should not be required to confer export eligibility of U.S. meat and poultry products destined for the Philippines.

Meanwhile, Malaysia's establishment approval process includes burdensome halal obligations that apply to the entire transportation system and requires U.S. slaughter and further processing establishments to submit detailed questionnaires that request business sensitive information. Because of these nontransparent, excessive requirements, the only U.S. beef establishment approved to export to Malaysia is currently suspended and a mere seven U.S. pork facilities are eligible to export, even though access is allowed for fresh, frozen, and unprocessed pork. Through its onerous import permit process, Malaysia has also implemented unclear, contradictory labeling requirements, which have led to product being held at ports. Malaysia has often failed to communicate changing labeling and other policies to the U.S. government, further exacerbating challenges U.S. exporters have faced navigating the market. Further impairing the U.S. meat and poultry industry's access is Malaysia's decision in 2022 to ban U.S. live poultry and poultry products over HPAI concerns, despite USDA's Animal and Plant Health Inspection Service's (APHIS) submission of a proposed regionalization agreement to allow trade to resume.

The Trump Administration's announcement on October 26, 2025, of an agreement with Malaysia on reciprocal trade<sup>14</sup> is a significant development because the text, as drafted, would resolve the foregoing concerns. Particularly, the agreement with Malaysia would substantially reduce tariff rates, including on U.S. meat and poultry exports, eliminate onerous establishment and product registration requirements, and enshrine science-based MRL commitments. Also, the agreement explicitly protects common meat name products, streamlines halal certification, and advances regionalization regimes for HPAI and African Swine Fever. The Meat Institute thanks President Trump and the Office of the U.S. Trade Representative for concluding such a pivotal agreement in the region, and encourages its swift implementation and enforcement. A similar agreement with Cambodia<sup>15</sup> would remove tariffs and cumbersome facility and product registration requirements for U.S. meat and poultry products, while advancing comparable MRL and common meat term provisions included in the agreement with Malaysia.

Countries, like Thailand, Vietnam, and Singapore, impose strict non-science trade barriers, including unjustifiable sanitary and phytosanitary measures (SPS), that unduly prohibit U.S. agricultural products from reaching these burgeoning consumer markets. For example, Thailand restricts beef offal and uncooked pork products and pork offal, and maintains zero tolerance on residues of ractopamine. There is no question about the safety of this product – it was approved for use in the U.S. after an exhaustive risk assessment by the U.S. Food and Drug Administration, it is recognized as safe for use in livestock production by the *Codex Alimentarius*, and many countries around the world, including several in the region, like Japan, have adopted ractopamine MRLs for imported products.

In addition, Singapore implements unwarranted trichinosis requirements and testing for imported pork products, despite the fact that the U.S. has instituted a strong biosecurity program for pork production that has been effective in drastically reducing the risk of trichinae in the U.S. swine herd to negligible levels. The Singapore government also restricts U.S.-approved pathogen reduction treatments. Plus, Vietnam maintains restrictions on white offal products, despite the market being officially open to these products. On June 24, 2025, Vietnam issued Circular No. 28, amending Circular No. 25/2016 on the quarantine of terrestrial animals and their products.

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<sup>14</sup> "Agreement Between the United States of America and Malaysia on Reciprocal Trade," The White House, October 26, 2025, [https://www.whitehouse.gov/briefings-statements/2025/10/agreement-between-the-united-states-of-america-and-malaysia-on-recipricol-trade/#\\_ftn3](https://www.whitehouse.gov/briefings-statements/2025/10/agreement-between-the-united-states-of-america-and-malaysia-on-recipricol-trade/#_ftn3)

<sup>15</sup> "Agreement Between the United States of America and Cambodia on Reciprocal Trade," The White House, October 26, 2025, <https://www.whitehouse.gov/briefings-statements/2025/10/agreement-between-the-united-states-of-america-and-the-kingdom-of-camboida-on-recipricol-trade/>

Despite feedback from trading partners and industry stakeholders, Vietnam maintained its zero-tolerance policy for *Salmonella* and *E. coli* O157:H7 in high-risk imported animal products for human consumption. This includes frozen/chilled meat, poultry, edible offal, and byproducts.

Prohibitive tariffs also impede U.S. meat and poultry exports to many countries in the region, including the Philippines, Vietnam, and Thailand. The Philippines, for instance, has some of the highest import duties in the world. U.S. pork trade into the Philippines surged in 2021, when the country, to help fill its African Swine Fever-related pork shortage, temporarily reduced import duties and expanded the country's Minimum Access Volume (MAV) quota. Tariffs fell from 30% to 15% for pork within MAV, whereas pork imports above the MAV are subject to a rate of 25%, down from 40%. Securing enduring tariff relief for U.S. pork exports remains a key priority for the industry, which exported more than \$120 million worth of pork and pork products to the Philippines in 2024, making it the U.S.'s tenth largest export market by value.<sup>16</sup> Likewise, U.S. beef exports to the Philippines are disadvantaged because Australia and New Zealand enjoy duty-free access through their respective trade agreements.

Phasing out the 50% tariff on U.S. beef and 30% tariff on U.S. pork to Thailand would similarly improve U.S. meat and poultry exporters' ability to compete in this growing market, while ensuring consumers who reside there have access to high-quality, nutrient-dense U.S. animal protein products. Likewise, U.S. beef exported to Vietnam faces a 30% tariff, while beef from chief competitors Australia, Canada, and New Zealand enter duty free through their membership in the Comprehensive and Progressive Trans-Pacific Partnership. In 2020, Vietnam reduced its Most Favored Nation tariff rates from 15% to 10% for frozen pork products, but the tariff rate remains significantly higher than the rates for competitors such as the European Union, Russia, and Canada that have trade agreements in place with Vietnam. The Meat Institute commends the recent joint trade statements released by the Trump Administration with the Governments of Thailand<sup>17</sup> and Vietnam<sup>18</sup>, which suggest progress on tariff rates for U.S. meat products and improvements to establishment and certification requirements that have hindered U.S. food and agriculture trade in both markets. The Meat Institute looks forward to reviewing the final text of those agreements.

Although non-tariff and tariff barriers in the aforesaid countries constrain U.S. meat and poultry export potential in these increasingly lucrative markets, the Trump Administration's proactive trade policy agenda that focuses on new market access opportunities is well positioned to reverse these impediments. The U.S., in the last few years, has abandoned substantive agricultural trade negotiations, instead allowing competitors like the EU and China, to grow further entrenched in Southeast Asia. By comparison, the Meat Institute welcomes the Trump Administration's assertion of American leadership in trade discussions. As other countries forge comprehensive trade agreements with preferential duties in Southeast Asia, American workers and companies will be disadvantaged, as U.S. products face higher costs and barriers to entry compared to their competitors. This will ultimately result in U.S. agriculture ceding market share in this critical economic region, which will strain American businesses and American workers, who rely on export markets for revenue to complement domestic production.

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<sup>16</sup> Ibid.

<sup>17</sup> "Joint Statement on a Framework for a United States-Thailand Agreement on Reciprocal Trade," The White House, October 26, 2025, <https://www.whitehouse.gov/briefings-statements/2025/10/joint-statement-on-a-frameowkr-for-a-united-states-thailand-agreement-on-recipricol-trade/>

<sup>18</sup> "Joint Statement on a Framework for a United States-Vietnam Agreement on Reciprocal Trade," The White House, October 26, 2025, <https://www.whitehouse.gov/briefings-statements/2025/10/joint-statement-on-united-states-vietnam-framework-for-an-agreement-on-reciprocal-fair-and-balanced-trade/>

In less than one year, the Trump Administration has already made historic strides to level the playing field for American agriculture producers, farmers, ranchers, and food industry workers in Indonesia, the Philippines, Malaysia, Cambodia, Thailand, and Vietnam, with plans to extend this progress to the entire region. By expeditiously implementing the previously mentioned deals and by negotiating binding agreements – that eliminate scientifically unjustifiable SPS barriers and that provide tariff parity for American meat and poultry products – with the other countries discussed in this section, the Trump Administration will succeed in offering much-needed certainty to and securing long-term economic stability for American farmers, producers, and rural communities.

### **Removing Ongoing Restrictions on Beef, Addressing Other Emerging Concerns are Necessary to Fully Implement KORUS**

The entry into force of the U.S.-Korea Free Trade Agreement (KORUS) in 2012, followed by the subsequent modernization of the agreement during the first Trump Administration in 2018, continues to pay dividends for the U.S. meat industry. The market access terms secured in KORUS – specifically, both the immediate and gradual elimination of tariffs on the vast majority of U.S. pork and beef imports – have yielded one of the leading, most reliable markets for U.S. meat exports.

Under KORUS, most U.S. pork products enter Korea duty-free, whereas the duty rate on U.S. beef has been reduced from 40% and will continue to decline each year until it is eliminated in 2026. Export data provide empirical support to underscore the boon of this tariff elimination for the U.S. meat industry. For example, before the implementation of KORUS, U.S. exports of beef and pork to Korea in 2012 totaled \$1 billion, but in 2024, U.S. beef and pork export value to Korea surpassed \$3 billion.<sup>19</sup> This level of growth, combined with the significant share of the Korean market the U.S. meat industry now commands, would not have been possible absent KORUS, especially because all major red meat competitors have trade agreements with Korea.

Beyond tariff relief, KORUS set forth strong, science-based trade measures that further contributed to the proliferation of U.S. meat exports to Korea. The agreement established a Sanitary and Phytosanitary Committee to enhance cooperation and consultation on SPS matters. This Committee works to achieve regulatory harmonization through international standards and guidelines to address animal health and food safety concerns. These and other mechanisms facilitate trade in meat and poultry products by promoting transparency and by enshrining a process to discuss and resolve, unjustified, often capricious impediments to that trade.

The U.S. industry, however, still faces numerous access obstacles, like Korea's restrictions on imports of U.S. processed beef products, including ground beef patties, beef jerky, and sausages. Additionally, Korea does not permit imports of U.S. beef and beef products from cattle over 30 months of age as well as imports of beef small intestines, tongues, collagen casings, trimmings, and ground beef items from cattle under 30 months of age. Beginning in 2024, Korea no longer accepts Codex MRLs for veterinary drugs. Korea instead now implements its Positive List System, which references only domestic MRLs, or import tolerances (IT), for veterinary drugs in beef, pork, and chicken, among other items. If a Korean MRL or IT does not exist, antimicrobial products will be subject to a 0.01 ppm residue tolerance, whereas a standard of "nondetection" applies for growth promotants and steroid type anti-inflammatory drugs. Implementation of this system reflects a departure from the international science-based, risk-based standards KORUS attempts to advance and requires continued monitoring and review to ensure it does not erroneously inhibit U.S. meat and poultry trade to Korea.

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<sup>19</sup> Ibid.

Despite U.S. poultry exports to Korea now enjoying duty free access, Korea remains a negligible market for U.S. poultry exporters due to its zero tolerance policy for Semicarbazide (SEM), a marker for nitrofurans, an antibiotic that has been banned for commercial use in the U.S. since the 1990s. Korea, in 2017, started suspending U.S. poultry facilities after positive findings of SEM. Nine U.S. poultry facilities are currently banned from exporting to Korea and others have decided to forgo shipping poultry products to Korea over concerns that they, too, will be delisted. Korea's zero tolerance for SEM is an unjustified trade barrier that precludes U.S. poultry exports, especially because Codex acknowledges that SEM forms in other natural ways and has established tolerance levels consistent with their evaluations.

Although resolving these longstanding access issues remains crucial for U.S. meat and poultry producers and exporters, Korea finished 2024 as our largest beef market and fifth largest pork market by value, demonstrating the broad success of the KORUS agreement. To achieve additional access for the poultry and beef products described above, the Meat Institute recommends working through the consultative mechanisms established in the KORUS agreement and engaging more regularly with Korean officials to secure these desired outcomes.

### **European Union (EU) and United Kingdom (UK) Policies Unduly Restrict Meat and Poultry Exports**

The Meat Institute commends the Trump Administration's diligent efforts to improve access for U.S. meat and poultry exports in the highly restrictive EU and UK markets. In particular, the Administration successfully negotiated a new duty-free 13,000 metric ton (MT) quota for U.S. beef exports to the UK, reflecting a marked increase from the scant 1,000 MT previously offered to the U.S. Similarly, the U.S.-EU Framework on an Agreement on Reciprocal, Fair, and Balanced Trade (Framework Agreement) appropriately sets forth preferential market access for U.S. pork and bison meat, by eliminating the 20% tariff on bison meat to the EU and addressing the small, complex tariff rate quotas applied to U.S. pork. Because of the tariff differential on pork – EU pork enters the U.S. duty-free – U.S. pork exports to the EU in 2024 were valued at \$3.2 million, whereas EU pork imports to the U.S. reached \$650 million, reflecting the urgent need to level the playing field for American pork producers and exporters.<sup>20</sup> Importantly, the Framework Agreement lays the foundation for increased exports of U.S. pork to the EU, especially when paired with the announced streamlined certificate requirements for U.S. pork exports. Removing from the EU export certificate superfluous language concerning trichinae mitigation requirements would be particularly beneficial due to the negligible risk of trichinae infection in U.S. swine herds.

The Trump Administration has laid the groundwork to begin offering U.S. meat and poultry producers and exporters a fair shot in the EU market, but the EU's hazard-based decision-making approach that has resulted in a persistent ban on the use of hormone growth promotants and FDA-approved beta agonists, along with its ban on the preponderance of pathogen reduction treatments (PRTs) used in U.S. slaughter establishments risks undermining the Administration's hard-won concessions. Specifically, with the exception of lactic acid solutions used on bovine or bison carcasses, antimicrobial treatments – for example, hyper chlorination and citric or ascorbic acids – are not allowed for treatment of red meat or poultry carcasses or carcass parts. In fact, most of the U.S. poultry industry primarily uses peracetic acid, which is simply an organic compound of vinegar and hydrogen peroxide. Unless these processing technologies, which have been approved by U.S. regulatory bodies and are accepted in numerous other export markets, are permitted for use by the EU, the U.S. meat and poultry industry will not be able to meaningfully grow its market share. Due to these regulations, U.S. beef enters the EU under two quotas: the EU High Quality Beef Quota and the Hilton Quota. Under the High Quality Beef Quota, 35,000 metric tons is allocated to the U.S., whereas a 20% tariff is applied to imports under the Hilton Quota. Adding complexity and cost to the export process, U.S. establishments interested in exporting beef to the EU must

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<sup>20</sup> Ibid.

participate in an AMS Export Verification (EV) program, which limits the number of facilities that can absorb the costs associated with shipping product to the EU.

Despite the UK's departure from the EU, the UK maintains the EU's unfounded processing technology, live animal, and plant approval requirements previously discussed, which essentially ban U.S. poultry meat exports. U.S. beef exports to the UK must comply with these same unjustified, non-scientific production requirements, which will undercut the U.S. beef industry's ability to fully realize the new, duty-free access the Administration negotiated. Moreover, U.S. pork exports to the UK are mostly constrained by high tariffs, including a rate of £72 per 100 kg on fresh/chilled and frozen boneless pork<sup>21</sup>, and face a significant competitive disadvantage vis-à-vis EU pork exports which enter the UK duty free. Eliminating tariffs on U.S. pork products shipped to the UK remains a top industry priority and the Meat Institute is encouraged by the Trump Administration's intent to build on its historic United States-United Kingdom Economic Prosperity Deal to address these tariff imbalances.

Meanwhile, EU Article 118 requires countries to implement prescriptive production-level controls on antimicrobial use and represents yet another attempt by the EU to impose its burdensome policies on trading partners, without allowing flexibility for countries, like the U.S., to address similar concerns through its own policies. Switzerland's decision to adopt Article 118 will impede high-value U.S. beef exports to this critical market, and every attempt should be made to avoid establishing an EV program that adds excessive costs to companies shipping or interested in exporting to Switzerland.

Furthermore, the Meat Institute applauds the Trump Administration's adept negotiating that resulted in the EU agreeing to address concerns of U.S. beef producers and exporters regarding the EU Deforestation Regulation (EUDR). As USTR understands, the EU's restrictive sustainability policies, including its unreasonable EUDR policy, threaten to further undermine the already limited access granted to U.S. meat and poultry products. The EUDR regulation would have imposed excessive, costly, and unwarranted record-keeping, traceability, geolocation, and product segregation requirements on U.S. agricultural producers, particularly beef and livestock producers. It is vital that the EU honors its commitment to minimize trade impacts for U.S. beef producers and exporters stemming from the EUDR. Ultimately, the U.S. should be exempt from this requirement as U.S. agricultural product exports are not retrieved from deforested land. We know the Trump Administration agrees that American farmers, ranchers, and companies should not be subject to invasive, burdensome, unwarranted foreign requirements that would act as technical barriers to trade.

The EU, in publications<sup>22</sup> following the announcement of the Framework Agreement, has made clear its unwillingness to compromise on many of the aforementioned SPS barriers inhibiting U.S. meat and poultry export potential. Instead, the trading bloc remains a laboratory of ever evolving and increasingly pernicious nontariff trade barriers that are not only restricted to the confines of the continent, but are also evangelized to countries with which the U.S. currently trades or may one day seek to establish trading relationships. The Trump Administration, thanks to the progress that has been made with the UK and the EU, is best positioned to press both trading partners to streamline and align their standards with science- and risk-based principles.

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<sup>21</sup> "EU and UK import tariff rates for selected pig meat products," AHDB, accessed September 29, 2025, <https://ahdb.org.uk/eu-and-uk-import-tariff-rates-for-selected-pig-meat-products#:~:text=The%20below%20table%20details%20the%20respective%20tariff,UK%20apply%20to%20imported%20pig%20meat%20products.>

<sup>22</sup> "Questions and answers on the EU-US Joint Statement on Transatlantic Trade and Investment," European Commission, August 20, 2025, [https://ec.europa.eu/commission/presscorner/detail/en/qanda\\_25\\_1974](https://ec.europa.eu/commission/presscorner/detail/en/qanda_25_1974)

### **Increasing Establishment Registration Requirements Risk Undermining Market Access for U.S. Meat and Poultry Exports in Global Markets, like Hong Kong**

The growing proclivity of existing and potential trading partners to impose establishment registration requirements, through lists, questionnaires, and other means, fails to uphold the principle of equivalence in international trade by downplaying the recognition of USDA as the competent authority responsible for determining the eligibility of U.S. meat and poultry exports. These burdensome, non-science and risk-based policies not only undermine international trading principles, but they also severely constrain the ability of U.S. companies to reach their full export potential.

These requirements are not unique to those described for Vietnam, Malaysia, and Indonesia – although, in the case of the latter two, the new U.S.-Indonesia Agreement on Reciprocal Trade and U.S.-Malaysia Agreement on Reciprocal Trade intend to remedy onerous registration requirements facing U.S. meat and poultry exporters. Excessive facility and product registration requirements are also pervasive in South America, including in Argentina, Bolivia, Brazil, Ecuador, and Uruguay. Recently, Hong Kong has also required that U.S. establishments exporting raw meat and poultry products appear on an approved list and has announced further regulatory requirements in a series of Annexes that are equally, if not more, problematic for the U.S. meat and poultry industry, particularly Annex 3, which requires overly prescriptive, business sensitive information that should not be mandated to confer export eligibility. The Meat Institute appreciates the ongoing work by USTR and USDA staff to resolve this issue.

Due to the proliferation of establishment registration-related regulations in global export markets, the Meat Institute urges USTR, in coordination with USDA, to defend and advance in trade discussions a systems-based approach to establishment approvals. When list requirements cannot be removed, the Meat Institute recommends that the U.S. government encourage trading partners to accept USDA's Meat, Poultry, and Egg Product Inspection Directory to satisfy requirements for U.S. beef, pork, and poultry establishments.

### **Build on the Momentum with Australia to Advance Progress for U.S. Beef, Pork, and Poultry Exports**

The U.S.-Australia Free Trade Agreement (FTA), implemented in 2005, is perhaps most consequential for the enhanced collaboration it has fostered between the two countries. Before the FTA entered into force, Australia's duties on U.S. pork and beef were already zero, except for some processed pork products, which were subject to a 5% duty that was phased out.

The Meat Institute appreciates the Trump Administration's initiative to buttress the FTA by concluding in July of this year a protocol<sup>23</sup> with Australia to permit the importation of fresh and frozen U.S. beef, including product sourced from cattle imported from Canada and Mexico, for the first time in more than two decades. Several U.S. beef establishments have since been added to the eligible plant list for Australia and are availing themselves of this important export opportunity. While U.S. beef export volumes to Australia will likely be relatively small, Australia's food service sector stands to provide a lucrative customer base for U.S. beef exporters. Meanwhile, U.S. exports of pork to Australia have grown dramatically, from \$10.6 million in 2004 to more than \$327 million in 2024. Volume increased from 3,400 mt in 2004 to more than 70,000 mt in 2024.<sup>24</sup>

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<sup>23</sup> "Fresh (chilled or frozen) beef and beef products derived from bovines born and raised in Canada or Mexico and legally imported and slaughtered in the United States," Australian Department of Agriculture, Fisheries, and Forestry, July 2025, <https://www.agriculture.gov.au/biosecurity-trade/policy/risk-analysis/animal/fresh-chilled-frozen-beef>

<sup>24</sup> "GATS Home," USDA Foreign Agricultural Service, USDA, accessed September 28, 2025, <https://apps.fas.usda.gov/gats/default.aspx>

Despite the FTA and this export progress, Australia continues to unfairly restrict access for U.S. fresh pork, bone-in pork, fresh and frozen poultry, and fresh and frozen lamb. Additional priorities for the Australia market include addressing the stringent biosecurity rules governing the movement and destruction of imported pork packaging materials that impede U.S. pork product exports to Australia. Therefore, the Trump Administration is best positioned to build on the success of its landmark beef access deal to ensure all U.S. meat and poultry exports to Australia can compete on a level playing field and are not subject to continued ill-conceived, unscientific import policies that inflict harm on American producers, farmers, ranchers, and companies.

### **Longstanding Barriers Preclude Beef, Pork, and Poultry Trade with South Africa**

South Africa's stubborn tariffs and nontariff barriers have frustrated U.S. meat and poultry export potential to the African continent's largest economy, while competitors in South America – who primarily supply beef and poultry – and in the EU – whose main exports include poultry and pork – continue to gain market share at the expense of American producers, ranchers, farmers, and meat and poultry companies. In fact, South Africa maintains prohibitive tariffs, which exceed 30%, on U.S. beef and bars entry of U.S. beef that has transited another country, adding undue complexity to the export process that has dissuaded U.S. beef exporters from establishing a foothold in the market.

Additional technical barriers inhibit red meat trade, including limitations on the types of pork muscle cuts that are eligible for export to South Africa, the lack of clarity regarding the country's lymph node removal requirement for pork shoulder cuts, and the ban on processed meat products. Unwarranted restrictions facing U.S. pork offal are particularly detrimental, as South Africa could be a significant market for U.S. pork hearts.

Equally contradictory and problematic to the spirit of fair trade are South Africa's mistreatment of U.S. poultry products. In 2015, following rightful pressure from the U.S. government and American poultry industry, South Africa established a TRQ for U.S. bone-in chicken that was slated to commence at 65,000 MT and grow annually. To date, South Africa has failed to honor that commitment – as evidenced by the mere 13,000 MT of U.S. chicken that entered the market in 2024, accounting for only 3.3% of the country's total chicken imports.<sup>25</sup> Effective March 2020, South Africa instituted a 62% tariff on bone-in chicken, further complicating U.S. exporters' ability to access the market, compared to EU poultry producers who receive duty-free treatment under the Southern African Economic Partnership Agreement.

Not only has South Africa intentionally undermined U.S. poultry imports through its mismanagement of the quota system, but it also has a history of shirking its commitment to that same 2015 agreement's avian influenza protocol, which stipulates that for any future detections of HPAI in the U.S., South Africa would impose trade restrictions at the state level. According to that agreement, restrictions are eligible to be removed after 90 days following virus elimination, but for a long time, the South African government had been slow to lift restrictions, at best, and more often nonresponsive to U.S. government outreach. Recently, South Africa's Department of Agriculture granted APHIS the ability to self-lift restrictions when HPAI-impacted states regain export eligibility at 90 days post-virus elimination. The Meat Institute welcomes this progress and encourages the U.S. government to ensure it is upheld.

If South Africa complies with its lifting of HPAI-related restrictions, U.S. poultry exports would realize an additional \$58 million in value. When paired with a reduction in South Africa's tariff rate on U.S. bone-in chicken exports from 62% to 37%, U.S. exports of these products would exceed \$100 million in value.

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<sup>25</sup> Ibid.

### **Precedent-Setting Protections for Common Meat Names Must be Replicated**

The Meat Institute, which belongs to the Consortium for Common Food Names, has worked closely with USTR over the past decade to prioritize protections for the production of and trade in meat and poultry products bearing common names. We applaud USTR's efforts to defend common meat name products in global markets, including the recent exchange of letters with the Government of Chile<sup>26</sup>, and in the previously described text of agreements with Malaysia and Cambodia, to protect market access for U.S. meat and cheese products, as well as other efforts currently underway to secure market access protections in strategic export markets.

For years, the EU has pursued a concerted global campaign to coopt common food and beverage names in trade and economic negotiations. To be clear, the Meat Institute does not oppose efforts to safeguard legitimate geographical indications (GIs), but we continue to urge USTR, in its engagement with trading partners, to make strides to explicitly defend the rights of common name meat producers to use terms that could otherwise be erroneously protected, yet whose generic status is well established.

Meat GIs are often compound terms, like "Prosciutto di Parma" and "Mortadella Bologna." Although the previously mentioned product names are recognized as GIs, their independent, component terms – "prosciutto," "mortadella," "bologna," in the preceding examples – should not be at risk and their generic status should not be jeopardized, particularly as current and potential trading partners engage in negotiations with the EU.

Attempts, particularly by the EU, to restrict common meat terms that have been in the public domain for decades, if not longer, are anti-competitive and protectionist. Such restrictions would cause undue harm to American producers by imposing onerous labeling, rebranding, and associated production costs. These producers could, in turn, lose access to crucial export markets, thereby causing some to shutter completely. Others would be forced to undertake cost-prohibitive consumer education campaigns to address confusion resulting from burdensome rebranding initiatives that would be required following unfounded changes to product names. Consequently, consumer choice would be curtailed in markets where high-quality, competitive U.S. meat products bearing generic names are shut out.

Equally as critical is the need to defend protections for translations and transliterations of common meat names. The EU's approach in GI negotiations either expressly prohibits translations or transliterations of common food and beverage terms or leaves open to interpretation regulations governing their use, injecting undue uncertainty in common meat and cheese name products trade. This is particularly problematic for common food name products in countries or regions with weak due process procedures and poor protection and enforcement of intellectual property rights. To that end, the Meat Institute continues to encourage USTR to urge trading partners to implement and uphold GI policies that are transparent and that establish enforceable due process procedures that promote impartial reviews of GI applications, including opportunities to oppose unjustified GIs before final determinations are made, since the EU typically takes advantage of non-existent or malleable regulatory regimes.

Restrictions on common food and beverage names stemming from the EU's anti-competitive, protectionist posture will only proliferate, and serve as non-tariff trade barriers, if vigorous attempts are not made to counter the EU's overreach. The Meat Institute appreciates USTR's ongoing initiatives to negotiate side letters, annexes, and other frameworks to protect common meat name exports, and urges USTR to pursue these arrangements

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<sup>26</sup> "U.S. and Chile Sign Exchange of Letters to Protect Market Access for U.S. Cheese and Meat Products in Chile," Office of the U.S. Trade Representative, June 28, 2024, <https://ustr.gov/about-us/policy-offices/press-office/press-releases/2024/june/us-and-chile-sign-exchange-letters-protect-market-access-us-cheese-and-meat-products-chile>

with existing FTA partners, prioritizing ones with which the EU is negotiating or has trade agreements. In addition to providing a list of common meat terms that should be eligible for continued use in these markets, the Meat Institute respectfully recommends that USTR secure protections for prior users of common meat terms in its engagement with trading partners, particularly as the EU often endeavors to dismantle such protections. As a starting point, we suggest using the Chile precedent to negotiate a similar side letter for common meat name products with Mexico – a side letter on cheese names already exists – because the EU-Mexico FTA has extended protections to meat GIs that could have longer-term implications for high-value U.S. meat exports to Mexico, including sausages and deli meats.

### **Proactive Efforts to Address Foreign Animal Disease are Essential to Preserving Trade and Business Continuity**

Detections of foreign animal diseases, such as African Swine Fever (ASF) and HPAI, pose significant threats to U.S. meat and poultry supply chains and exports. Although ASF has not been detected in the U.S., a positive finding would yield immediate, devastating consequences for producers, packers and processors, and ancillary industries across North America, due to the integrated nature of pork supply chains in the USMCA region. Positive ASF findings would severely constrain the production and processing of pork across the continent, wreak havoc on these integrated supply chains, exacerbate consumer prices, and devastate communities that rely on cross-border pork trade.

Historically, approximately 25% of U.S. pork production is exported, and U.S. pork exports in 2024 contributed \$64 per head slaughtered, supporting workers, livelihoods, and communities across the U.S. Continued, and more proactive, coordination between USTR and USDA – in particular, APHIS, which is leading ASF zoning and regionalization negotiations with trading partners – is critical to preserving trade and business continuity, in line with international standards, for the U.S. pork industry. ASF presents extraordinary challenges and requires unwavering focus and prioritization from both USDA and USTR to minimize supply chain shocks and safeguard access to existing markets without jeopardizing the potential global footprint of the U.S. pork industry.

In addition to engaging in meaningful regionalization negotiations with some of our high-value markets in Asia, like Japan and Korea, it is imperative that the U.S. government redouble its efforts to secure trade continuity agreements with Canada and Mexico, which not only safeguard existing vigorous business relationships across North America, but also ensure durable regional supply chains continue to promote and protect U.S. economic and national security. Mexico and Canada are top four value markets for U.S. pork and pork products, and, in 2024, Mexico was the U.S.'s largest value market for U.S. pork, with exports approaching \$2.6 billion.<sup>27</sup> The U.S. pork industry has recently approved traceability programs that we have shared with the U.S. government, and we urge USTR to work closely with USDA to make meaningful progress to proactively negotiate ASF regionalization framework agreements with U.S. trading partners. Much of the pork the U.S. industry exports cannot be easily absorbed domestically, further necessitating agreements with trading partners that preempt ASF detection to mitigate the significant impact of movement and other trade restrictions that would be imposed in the days immediately following a positive ASF finding in the U.S. swine herd.

Also, HPAI remains an ongoing threat to the U.S. poultry industry and U.S. poultry exports as trading partners, including Mexico and Colombia, have in the past years reneged on previous HPAI arrangements with the U.S. and have disregarded internationally recognized science-based trade principles. The Meat Institute appreciates the work of the U.S. government to address HPAI-related restrictions, including with Mexico and Colombia, and encourages USTR to support efforts by USDA to resolve and preempt unwarranted bans on U.S. poultry product

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<sup>27</sup> "GATS Home," USDA Foreign Agricultural Service, USDA, accessed September 28, 2025, <https://apps.fas.usda.gov/gats/default.aspx>

exports, including in China and South Africa, as previously discussed. This includes enforcing existing HPAI agreements; the lack of enforcement of these agreements with the aforementioned countries and other trading partners is projected to cost the U.S. poultry industry more than \$700 million in export losses in 2025.

The need for additional, sustained collaboration has only increased with HPAI detections in dairy cows. Efforts should be made to continue to ensure U.S. beef trade is not subject to specious, non-scientific HPAI-related restrictions in foreign export markets, particularly because such restrictions would conflict with the World Organization for Animal Health's guidance to avoid placing HPAI bans on beef trade.<sup>28</sup>

Furthermore, as the threat of New World Screwworm (NWS) to the U.S. beef industry has intensified, the Meat Institute commends the swift, decisive actions taken by the Trump Administration to prevent its introduction to the U.S. cattle herd. The Trump Administration's investments in state-of-the-art sterile fly dispersal and production facilities; its incentives for novel traps, lures, and therapeutics; and its direct financial and technical support for Mexico's NWS containment and eradication efforts underscore its unwavering commitment to ensuring the safety and security of the U.S. beef industry. And, while the integrity of our beef industry must not be compromised, U.S. beef producers and companies rely on approximately 1.3 million head of cattle from Mexico annually to complement their production and support their livelihoods. This type of cattle from Mexico helps keep consumer prices stable, thereby combatting food inflation, and makes producers more resilient to withstand contraction periods in the cattle cycle, like the one they are currently facing. Consequently, the Meat Institute supports the Trump Administration's ongoing evaluation of Mexico's NWS mitigation and eradication efforts, and welcomes an eventual, phased, science-based, risk-based resumption of live cattle imports from Mexico to complement domestic production when USDA determines such a move is practicable based on its rigorous assessment methods.

Mitigating unfounded trade restrictions related to foreign animal diseases promotes U.S. food security, protects livelihoods for American workers and companies, defends America's gold-standard science- and risk-based decision-making, and safeguards supply chains, particularly when product intended for export cannot easily be repurposed domestically.

### **Conclusion: Market Diversification Through a Comprehensive Trade Policy Will Help Level the Playing Field for U.S. Meat and Poultry Exporters**

The Trump Administration has leveraged many tools at its disposal to effectively and swiftly address existing and emerging trade barriers in support of America's farmers, ranchers, agricultural producers, and meat and poultry companies. The Meat Institute applauds the Administration's focus and progress to date, and respectfully encourages the continued pursuit of a comprehensive trade strategy that emphasizes enforcement of existing agreements and that promotes market diversification through the negotiation of new agreements that reduce and eliminate onerous import restrictions, prohibitive tariffs, and other unwarranted non-tariff barriers. The Trump Administration's bold trade policy vision presents a clear opportunity to bolster fair and resilient agricultural trade for American exporters in global markets and is a welcomed departure from the previous Administration's abdication of America's leadership role in negotiating enforceable, standard-setting trade agreements that level the playing field for America's farmers, ranchers, businesses, and workers. This is particularly relevant as China, the EU, and other competitors aggressively negotiate trade agreements that shirk internationally recognized standards and squeeze U.S. access to growing and mature markets, alike.

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<sup>28</sup> "High Pathogenicity Avian Influenza in Cattle," World Organisation for Animal Health, April 5, 2024, <https://www.woah.org/en/high-pathogenicity-avian-influenza-in-cattle/>

As previously detailed, the Trump Administration's prior work to negotiate the Phase One Agreement with China proved to be a boon for U.S. meat and poultry exports. And, thanks to that agreement, China, in 2024, was the U.S.'s third largest value market for American beef, pork, and poultry exports. However, this year, because China has acted in direct violation of the Phase One Agreement, U.S. meat and poultry exports have declined precipitously, with the market essentially shut to American beef. As USTR weighs measures to hold China accountable for certain nefarious practices and policies, the Meat Institute requests that particular attention be devoted to the inconsistent plant approval and expiration process and the intractable product and establishment suspension concerns described in this submission's section on China. The Meat Institute supports new, compulsory language that reinstates expired and suspended U.S. meat establishments and advances China's compliance with and enforcement of existing provisions in the Phase One Agreement in a manner that sustains and strengthens the U.S. meat and poultry industry's access to the China market.

Preserving and amending existing agreements, while indispensable, will be insufficient to guarantee export growth or the economic benefits it confers, nor will doing so ensure the U.S. remains competitive in an increasingly dynamic trade environment that features an aggressive, ascendant China and an EU government intent on forging favorable access for their producers. For instance, while the U.S. has completed four trade agreements since 2010, including the first Trump Administration's successful renegotiation of USMCA, China has entered into 10 new agreements, Japan has inked seven, and the EU and Canada have finalized eight. In only a few months, the America First Trade Policy Agenda has reasserted U.S. leadership in trade discussions and has improved the terms of access for U.S. meat and poultry exports in global markets, particularly in Southeast Asia, with more progress expected thanks to the flurry of ongoing negotiations being spearheaded by the Trump Administration.

Countries, like Indonesia, Vietnam, and the Philippines, represent strong growth markets for U.S. agricultural exports, augmented by rising population and income levels. Pursuing bilateral and sectoral trade-facilitative measures with these and other countries in Southeast Asia will yield long-term benefits for the U.S. meat and poultry industry by injecting more predictability and transparency into business decisions and ensuring U.S. meat and poultry supply chains are not overly dependent on one country or region. These types of bilateral arrangements are also the primary means to achieve enduring relief from both tariffs and onerous non-tariff barriers, like cumbersome establishment registration, halal, and SPS requirements, currently levied against U.S. meat and poultry exports to the region. By embarking on a more proactive, enforceable trade strategy that results in binding access commitments, like the one the Administration is pursuing, the U.S. can more effectively and decisively leverage its innovative, efficient agriculture and farm production sector to compete with those in China and the EU.

India, meanwhile, recently took steps to reduce duties on certain frozen turkey and duck products from the U.S., but work is still needed to eliminate the 30% tariff levied on whole chickens and 100% tariff assessed on certain U.S. chicken product exports to India. In early 2022, India granted access for U.S. pork and pork products. However, later that year, India proposed additional facility registration and certificate requirements that have resulted in almost no U.S. pork exports to the country, despite the fact that India's rapidly developing e-commerce sector holds immediate opportunities for consumer-ready U.S. pork products.

Although challenges with Korea were presented in the foregoing comments, trading partners like Korea, Japan, Canada, and Mexico, represent critical markets for U.S. meat and poultry products and many of the longstanding and emerging issues that exist with these countries can be addressed through consultative mechanisms that were negotiated in those agreements, which the prior Trump Administration bolstered. In contrast, regulatory impediments imposed by the EU, and continued by the UK following its departure from the EU, show little sign of

abating. The Trump Administration's recently announced increased quota volumes and reduced tariff rates for certain beef products to the UK and pork and bison products to the EU are encouraging. Prioritizing through decisive actions the elimination of stubborn pathogen reduction treatment, beta agonist, and hormone restrictions in the UK and the EU is a prerequisite for the U.S. meat and poultry industry to realize tangible gains in both markets.

The absence over the last four years of a proactive trade policy agenda that pairs ambitious tariff reductions with the removal of non-tariff barriers has disadvantaged American workers, American farmers and ranchers, and American meat and poultry companies, who face higher costs and barriers to entry compared to those of their competitors. That dearth of leadership has now been reversed. Securing binding, enforceable commitments from trading partners through bilateral and sectoral agreements, as envisioned in the President's America First Trade Policy Agenda and the Trump Administration's current negotiating strategy, will not only establish a more level playing field for American agricultural exports, but doing so will also safeguard the American farm economy and rural communities, by enhancing livelihoods of American farmers, ranchers, and meat and poultry companies, who rely on export markets for income, but whose trade priorities have largely been overlooked by previous Administrations.

The Meat Institute appreciates the opportunity to submit these comments and applauds the Trump Administration's keen interest in – and achievements to date – minimizing trade barriers facing U.S. meat and poultry exports in global markets. We remain committed to our strong partnership with the Administration and stand ready to collaborate on priority issues and markets to promote the long-term stability and growth of the American meat and poultry industry, American agricultural communities, and the overall U.S. economy.

Respectfully submitted,



Julie Anna Potts  
President and CEO  
Meat Institute