International trade is vital to the long-term strength of the U.S. meat and poultry industry, and supports thousands of jobs along the supply chain. In 2021, red meat exports reached $18.7 billion, and accounted for 29.4% and 15% of U.S. pork and beef production, respectively. However, the U.S. meat and poultry 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.

The Biden Administration, in May 2022, unveiled the Indo-Pacific Economic Framework (Framework), its strategy for deeper engagement in the Asia-Pacific region. ASEAN countries – many of which are participating in the Framework – collectively comprised the eighth largest value market for U.S. beef and beef variety meat exports in 2021, with export value exceeding $287 million. The region also represented the eighth largest export market for U.S. pork in 2021, with pork export value totaling more than $235 million. With ASEAN projected to become the world’s fourth largest economy by 2030, and India estimated to overtake China as the world’s most populous country, the U.S. agriculture sector, and meat and poultry industry, stand to benefit from a robust economic partnership in the Indo-Pacific. Yet, accessing these important, growing markets, where 60% of the global population resides, will remain elusive if current non-tariff barriers to trade persist.

The Framework offers an opportunity to confront longstanding obstacles that have hindered U.S. meat and poultry trade in the region by providing a forum to negotiate reforms to onerous, trade-inhibiting policies and regulations. Key meat and poultry industry trade priorities in the region follow.

1. **Address Non-Tariff Barriers and Promote Science-Based Trade Rules**
   b. Singapore and Australia have erected trade-restrictive barriers, that conflict with WOAH standards, on U.S. pork due to unsupported concerns over trichinae and Porcine Reproductive and Respiratory Syndrome in the U.S. swine herd. Meanwhile, Thailand unjustifiably maintains a zero tolerance policy for meat imports with residues of ractopamine, an animal feed additive that improves efficiency in pork production.
   c. Vietnam’s import licensing regime unduly restricts certain U.S. beef and pork offal products.

2. **Encourage Adoption of Systems-Based Approvals for Facility Registration**
   a. Many countries in the region, like Indonesia, Vietnam, and Malaysia, implement a cumbersome plant-by-plant approval process, rather than a systems-wide approach adopted by the U.S., instead requiring companies to register their establishments on an individual basis.
to be eligible to export. This process disregards USDA’s authority over all federally inspected meat and poultry establishments and adds undue complexity and costs to the export approval process.

3. **Improve Market Access Through Tariff Reductions and Quota Reforms**
   a. While broad-based tariff reductions are not expected under the Framework, it should nonetheless include targeted efforts to reduce tariffs on U.S. agricultural exports.
   b. The U.S. faces tariff disadvantages in the region because of reductions and duty eliminations agreed in the CPTPP, the ASEAN-Australia-New Zealand FTA, and the EU-Vietnam FTA. For example, although Vietnam temporarily reduced its Most Favored Nation Tariff (MFN) rate on pork from 15 to 10% in July 2022, U.S. pork will still face a tariff disadvantage compared to the EU, Canada, and Russia. U.S. frozen and chilled beef in Vietnam is subject to 14 and 20% duties, whereas competitors, like Australia and New Zealand, receive duty-free access.
   c. Thailand’s import duties are trade-prohibitive, with U.S. beef facing a 50% duty and U.S. pork subject to 30-40% tariff rates. Likewise, the Philippines implements some of the world’s highest pork import duties. In India, the market is effectively closed to U.S. poultry exports, which incur a duty rate near 100%.
   d. These tariff discrepancies dramatically reduce the export potential of U.S. meat and poultry in the region. Even if non-tariff barriers are addressed, access will be severely impeded by excessive tariffs. This not only weakens export value, but also detrimentally impacts American meat and poultry companies and the workers they sustain.

4. **Secure Meaningful Market Access Under Existing Trade Agreements**
   a. The U.S. has existing FTAs with Korea (KORUS) and Australia. Yet Korea, for instance, bars imports of U.S. processed beef products and U.S. beef and beef products derived from cattle imported from Canada for immediate slaughter based on unfounded BSE concerns. Beef and beef products derived from cattle imported from Canada that reside in the U.S. less than 100 days prior to slaughter are also ineligible. Australia, meanwhile, continues to restrict access for chilled/frozen U.S. beef and largely limits imports of U.S. pork to product destined for further processing.

5. **Prioritize Regionalization Agreements**
   a. Global meat and poultry exports have been significantly impacted by the spread of foreign animal diseases (FAD) such as African Swine Fever and Highly Pathogenic Avian Influenza. The Framework should provide a forum to establish regionalization agreements, promoting WOAH regionalization principles consistent with science-based rulemaking, to prevent complete market closures in the event of a FAD outbreak.

**Contact:** Michael Schumpp  
Director, International Affairs  
NAMI  
202-587-4251  
mschumpp@meatinstitute.org