

Navigating the Dynamic Global Trade Landscape: Insights and Strategies

Exploring Challenges and Opportunities in a Volatile Trade Environment

IBO Summit, 2025
Darci Vetter



**In the short term, the
only thing certain is
uncertainty.**



Tariffs are an All-Purpose Tool

Tariffs used as:

- Leverage in non-trade disputes
- Source of federal revenue
- Incentive to revive US manufacturing



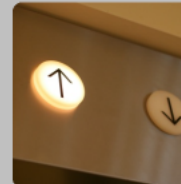
Country and Product Specific Rules

Onerous tracking of multiple, layered tariff rates

A screenshot of a document titled "New Tariff Requirements for 2025" from the U.S. Trade Representative. The document lists various tariff categories and their corresponding rates. The categories include: 1. General Tariffs, 2. Tariffs on Goods from China, 3. Tariffs on Goods from the United Kingdom, 4. Tariffs on Goods from the European Union, 5. Tariffs on Goods from Japan, 6. Tariffs on Goods from South Korea, 7. Tariffs on Goods from Taiwan, 8. Tariffs on Goods from Thailand, 9. Tariffs on Goods from Vietnam, 10. Tariffs on Goods from the United States. The rates are listed in a table with columns for the category, the rate, and the effective date. The document is dated 10/1/2024 and is a 10-page document.

Rapidly Changing Rates and Deals

Rates change with little notice; negotiated deals lack detail



Key Elements of Uncertainty

Tariffs are an All-Purpose Tool


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Country and Product Specific Rules













Onerous tracking of multiple, layered tariff rates




New Tariff Requirements for 2025


Send questions to: traderemedies@cbp.dhs.gov
Updated 8/20/2025
CBP Publication No. 5117-0825

Through Executive Orders and Proclamations, the President has imposed new tariffs on goods imported into the United States pursuant to the International Emergency Economic Powers Act (IEEPA) and Section 232 of the Trade Expansion Act of 1962. **This is a high-level overview. Many exemptions and other detailed provisions may apply that are not summarized below.** For complete information, visit the CBP.gov website using the QR code below.

 Autos, Auto Parts As of May 3: 25% Section 232: 25% on passenger vehicles and light trucks and auto parts of all countries, except UK and USMCA. See below for unstacking.	 Copper As of August 1: 50% Section 232: 50% on imports of semi-finished copper products and intensive copper derivative products of all countries. See below for unstacking.	 Steel As of June 4: 50% Section 232: 50% on imports of steel (including derivatives) of all countries, except UK (25%). See below for unstacking.	 Aluminum As of June 4: 50% Section 232: 50% on imports of aluminum (including derivatives) of all countries, except Russia (200%) and UK (25%). See below for unstacking.
 Brazil As of August 6: 40% IEEPA: 40% on all nonexempted goods. Stacks with Reciprocal rate.	 Russian Oil (India) As of August 27: 25% IEEPA: 25% on all nonexempted goods of India. Stacks with Reciprocal rate.	 Canada As of August 1: 35%, 10% Energy & Potash IEEPA: 35% on all goods except 10% on energy and potash; exemptions for USMCA-originating goods. See below for unstacking.	 Mexico As of March 7: 25%, 10% Potash IEEPA: 25% on all goods except 10% on potash and exemptions for USMCA-originating goods. See below for unstacking.
 China/Hong Kong As of March 4: 20% IEEPA: 20% tariff on all goods. Additional IEEPA reciprocal rate of 10%.	 Reciprocal As of August 7: 10% to 41% IEEPA: 10% minimum for all countries, then specific rates for all nonexempted goods; 10% to 41% for 95 countries.	 Unstacking Certain Tariffs 1. Products subject to Auto/Auto Parts 232 are not subject to Copper/Aluminum/Steel 232, Reciprocal, Brazil/Russian Oil/Canada/Mexico IEEPA. 2a. Content subject to Section 232 Aluminum/Steel is not subject to Reciprocal, Brazil, Russian Oil, or Canada/Mexico IEEPA. 2b. Content subject to Section 232 Copper is not subject to Reciprocal, Brazil, or Russian Oil. Products with a mixture of copper, steel, and/or aluminum content continue to be subject to all of the applicable Copper/Steel/Aluminum 232 tariffs.	
 De Minimis As of August 29, de minimis duty free entry is no longer available for goods from any country.			



U.S. Customs and Border Protection



Office of Trade | Trade Remedies

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Disregarding Most-Favored Nation (MFN) Treatment

Introduction of "Reciprocal" Rates for Each Country

Reciprocity based not on terms of trade,
but the size of the trade deficit

Negotiations May Provide Opportunities

As countries scramble to negotiate better terms, tariffs and
other trade barriers may be addressed



Transitioning to "Reciprocal" Trade

Disregarding Most-Favored Nation (MFN) Treatment

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Is This Legal?

Unprecedented use of IEEPA to impose tariffs.
Supreme Court will hear challenge in November.



Where is Congress?

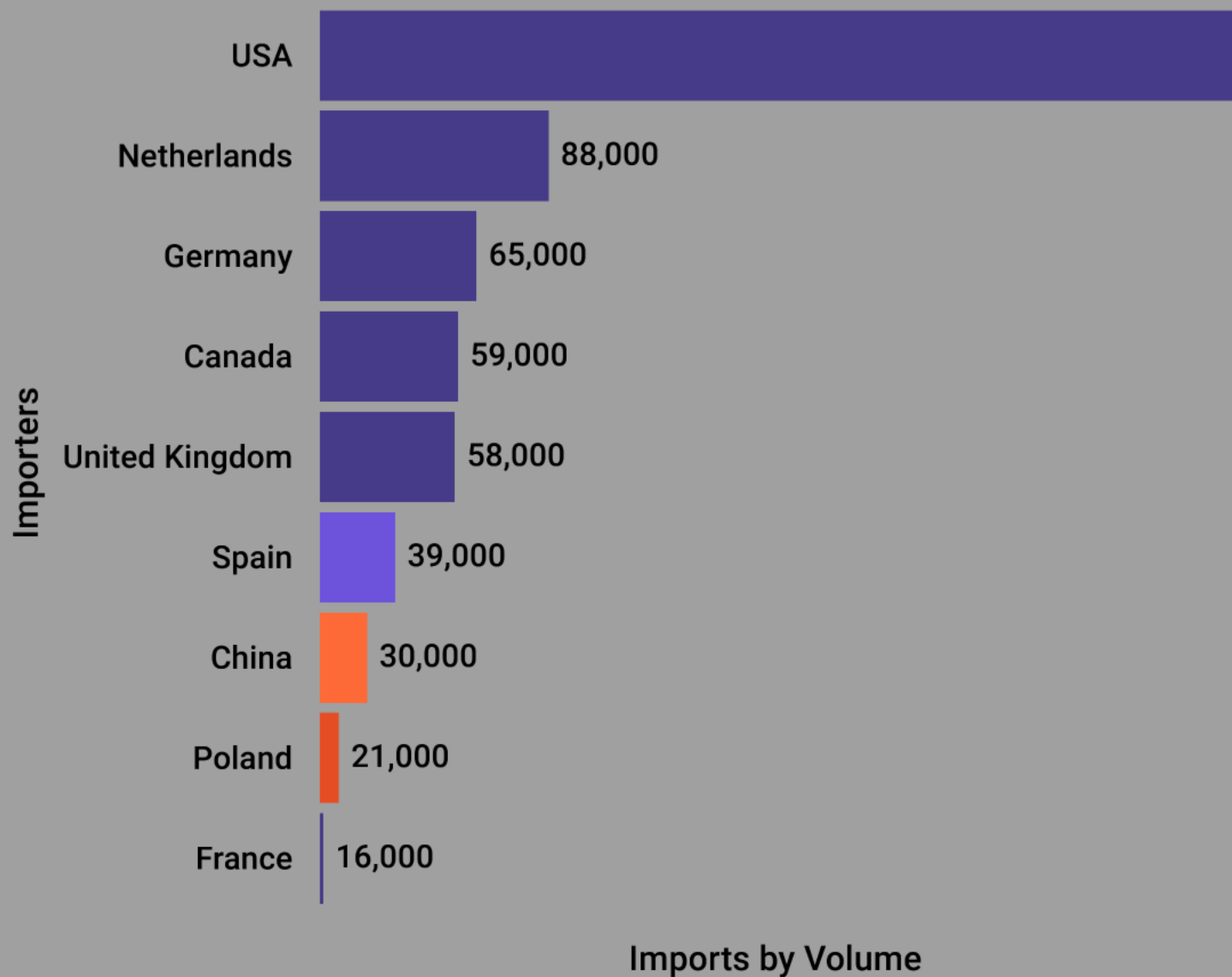
Tariff authority lies with Congress, but Congress
delaying decisions on tariff oversight.



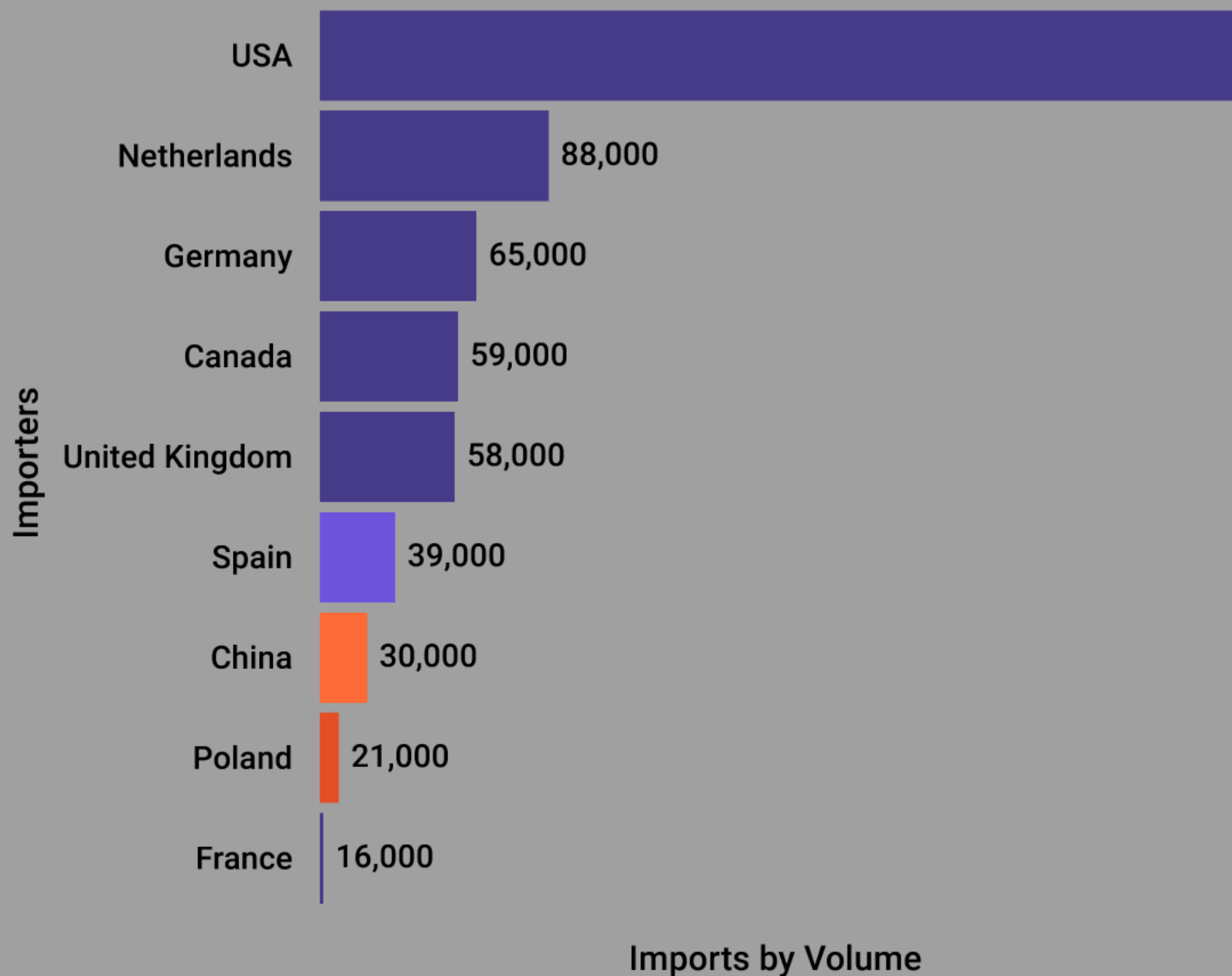
**What does this mean
for Blueberries?**



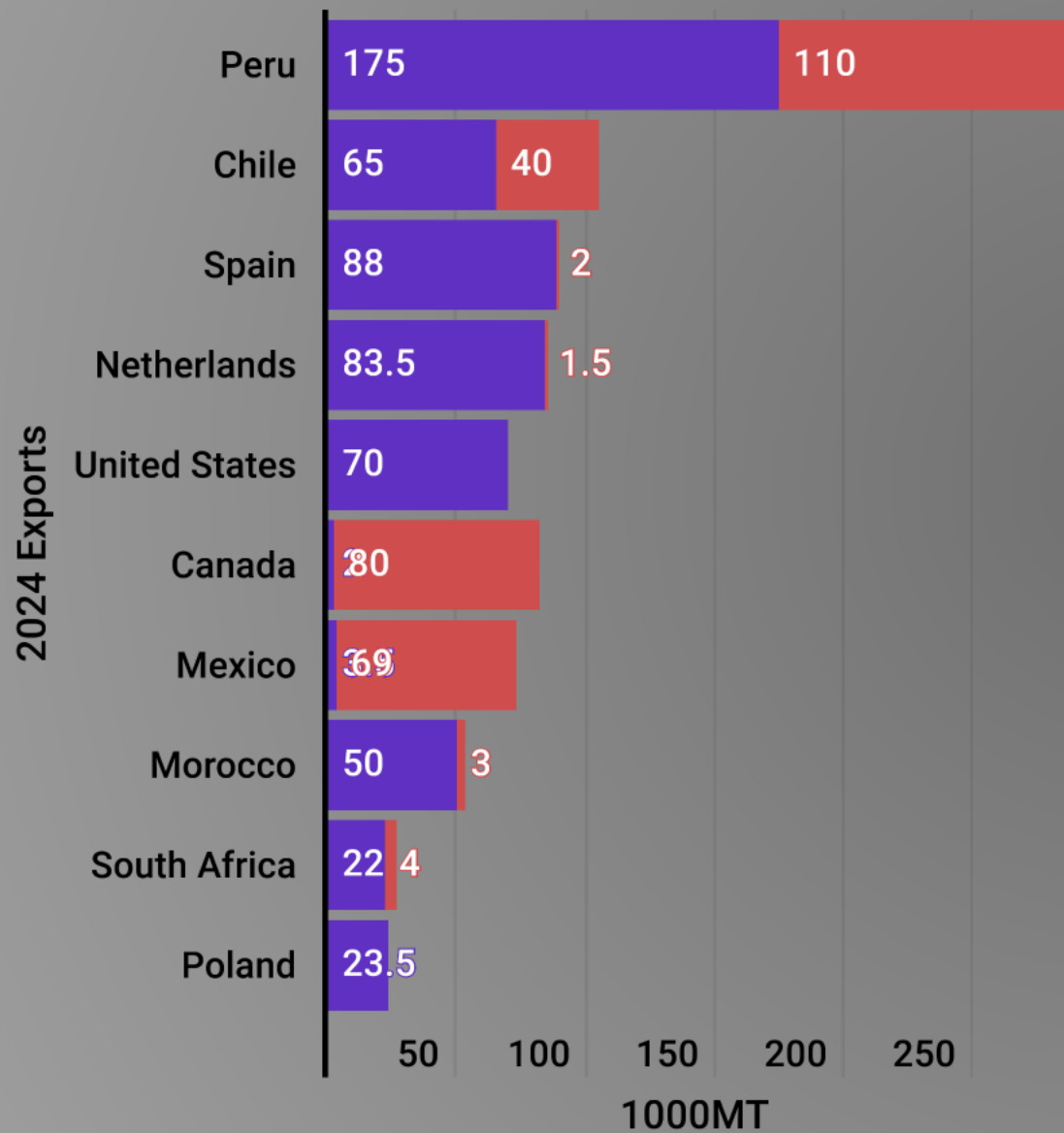
United States is the Largest Blueberry Importer (by far)



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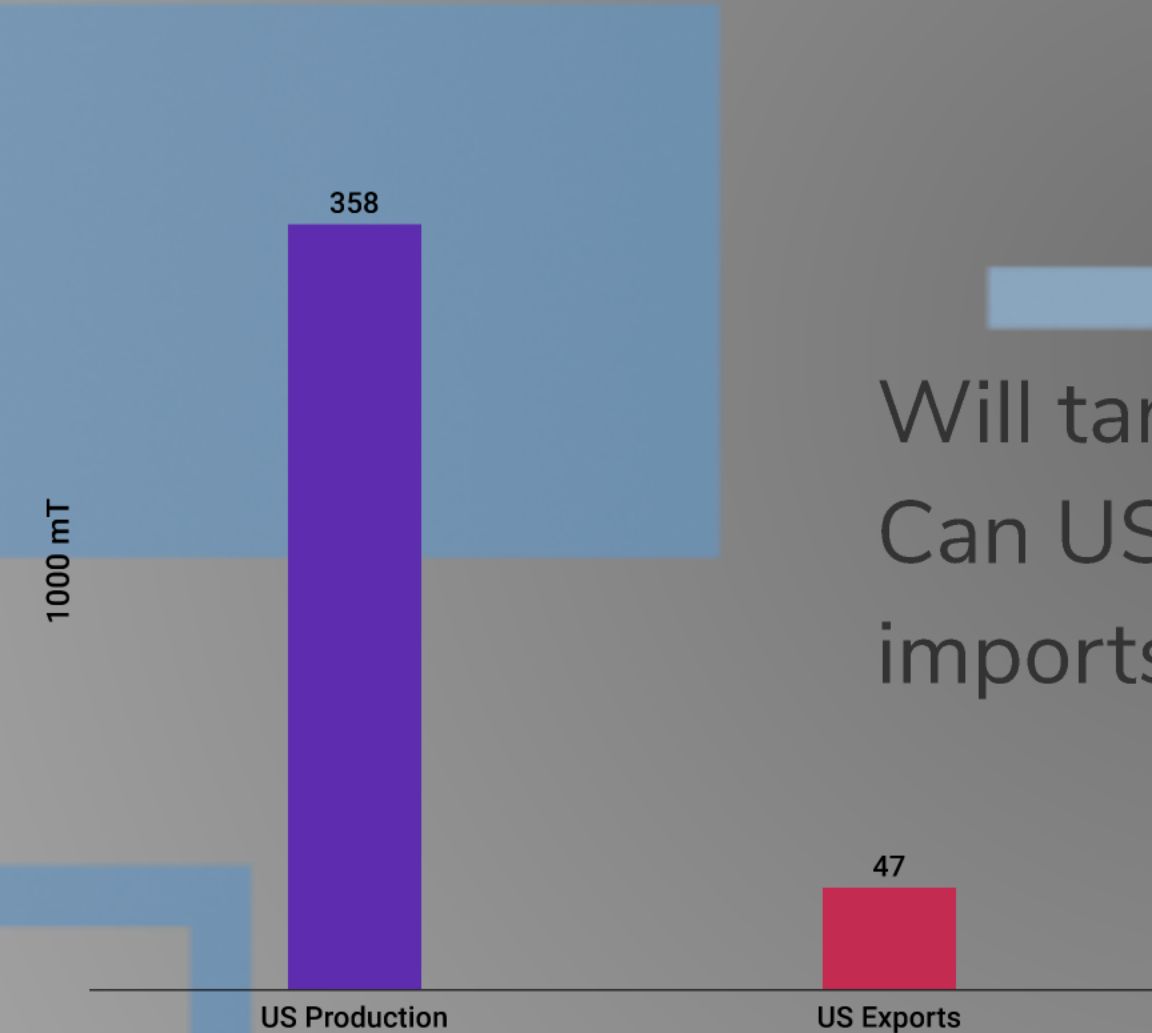


...And a Top Destination for Many Exporters



New US Tariff Rate:	
Peru	10%
Chile	10%
Canada	0%
Mexico	0%
Morocco	10%
South Africa	30%

How will Tariffs Impact US Production? Exports?



Will tariffs on inputs decrease production?
Can US production replace higher cost imports?



Exemptions for Berries?

USTR has new authority to exempt certain agricultural products from tariffs



Exemptions for Inputs?

Critical inputs could also see tariff relief.

Next Up: The USMCA Review

Review kicking off--comment period open in the US and Mexico

Will fresh/seasonal produce trade remain duty free?

Will countries adopt similar border measures toward third countries?



Stay Informed on Trade Policies

Be Prepared to Diversify Supply Chains

Utilize Your Trade Associations--Data is Essential

**Connect the Dots--
Storytelling is Key**



Strategies for Adapting to and Influencing Trade Policy Change

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Be Prepared to Diversify Supply Chains

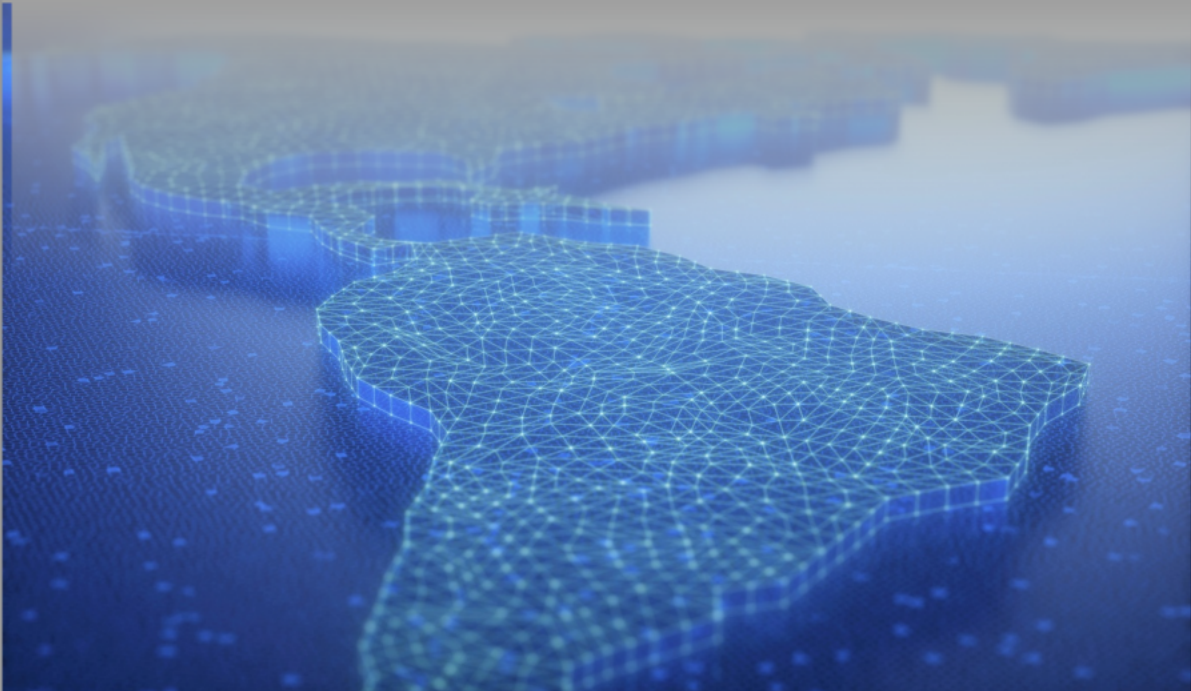
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Long-Term Implications of Current Trade Policies

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US Support for International
Institutions Wavering



**Food and Agriculture
Organization (FAO)**



**World Health
Organization (WHO)**



**World Trade
Organization (WTO)**



**Food Safety and Plant
Health Standards
Depend on Strong
International Institutions**

Food and Agriculture Organization (FAO)



World Health Organization (WHO)



World Trade Organization (WTO)



Trump Thought He Was Leading on Trade. No One Is Following.

Sept. 5, 2025



**International
Commitments
Remain
Resilient**



**Regional Alliances:
Collaboration and Capacity Building**



**Free Trade Agreements:
Broader Scope, Deeper Alliances**

Collaborative Partnerships

Leverage existing networks and collaborate with stakeholders across food and agriculture, focusing on collective goals and shared resources.

Policy Advocacy

Engage with policymakers at multiple levels to advocate for policies that support fair trade practices and ensure your priorities are reflected in legislation.

Data-Driven Storytelling

Utilize data-driven storytelling to connect the dots between trade, local economies, nutrition and health, highlighting the importance of your firm and your industry.



Opportunities for Leadership in Trade and Agriculture

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