

## USA Pulses September 2025

### Impact of Tariffs and Trade Barriers on U.S. Pulse & Ingredient Exports to China

**USA Pulses** is the leading voice for U.S. pulse growers, processors, exporters, ingredient suppliers, and food companies. Our mission is to promote the use of American-grown dry peas, lentils, chickpeas, and dry beans by advancing international trade, ingredient innovation, and consumer awareness. We aim to double global consumption and production of pulses through coordinated marketing, strategic partnerships, and evidence-based policy engagement.

The U.S. pulse industry plays a critical role in supplying nutrient-dense, resilient, and affordable foods to global markets. The top pulse-producing states—**North Dakota, Montana, Washington, and Idaho**—are global leaders in quality, with pulse exports accounting for a substantial share of U.S. production. For example, in the 2024–25 marketing year, 75% of lentil production, 45% of dry pea production, and 33% of chickpea production are projected to be exported.

Exports of U.S. pulses reached \$624.6 million in 2023–24 and are forecast to grow to \$652.2 million in 2024–25, marking the sector’s strongest performance in nearly a decade. This growth is fueled by improved logistics, rising demand for nutritious plant-based foods, and the partial resolution of key trade barriers. Despite volatility in ingredient exports, demand for whole pulses remains strong across Asia, Europe, Latin America, and Africa. Importantly, value-based tracking of pulse-derived ingredients (e.g., flours, proteins, fibers) continues to show commercial promise and is a priority for ongoing analysis.

#### Background and Strategic Context

China has been a lost opportunity for American farmers and pulse producers especially as US suppliers have been excluded from the China market by retaliatory tariffs. Increased demand for dry peas to be used in pea protein products is a major opportunity to increase pulse exports to China and balance the trade deficit. Canadian farmers and suppliers from other countries have stepped in to fill the void left by America’s absence; during the worst of the trade war, the value of US exports of dry yellow pea fell from \$13 million to zero. The market returned to pre-trade war levels as the US and China entered into the phase 1 agreement, demonstrating the importance of an open market.

#### Policy Position:

USA Pulses recognizes the unfair business practices that China has used to gain an advantage over the US, but our farmers are bearing a disproportionate burden in this trade war. The administration should continue strong negotiations and actions against China especially if bilateral talks lead to increased market access for pulse producers and lead to the balancing of the trading relationship. The agreement to purchase large quantities of soybeans by China shows the importance of agriculture in the trade relationship and pulses should be included in considerations of bulk purchases of US agricultural products.

#### Market Overview of China

China represents one of the most volatile yet potentially lucrative markets for U.S. pulse exports. Historical data shows significant fluctuations, with values ranging from a low of \$8.71M in 2021-22 to a high of \$56.42M in 2020-21. The most recent data shows exports valued at \$35.98M in 2023-24, demonstrating the market's current substantial scale despite challenging trade conditions. This volatility reflects both policy uncertainty and changing domestic supply-demand dynamics within China.

## Non-Tariff Barriers

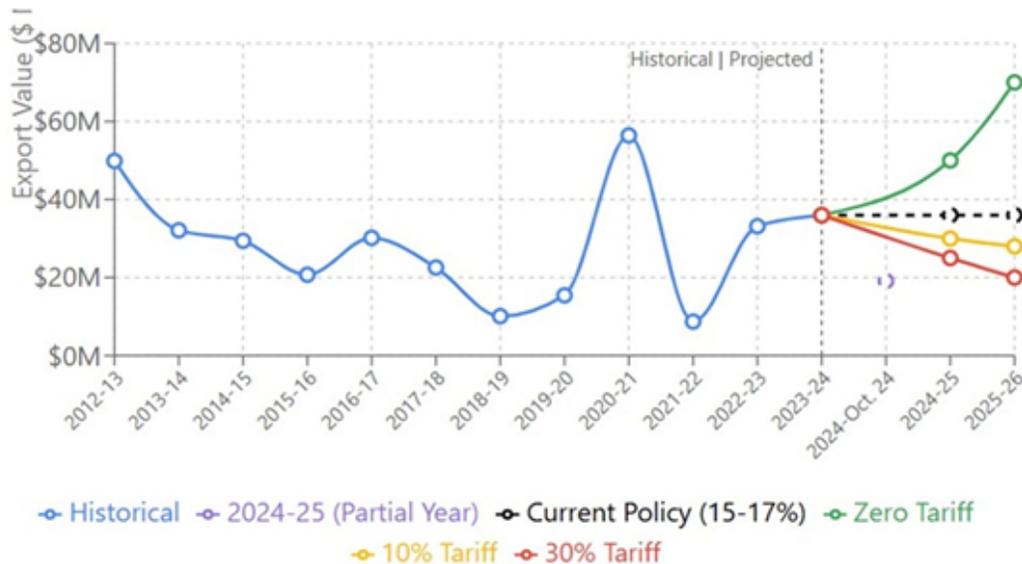
China employs a complex licensing system that currently prevents American producers from exporting certain pulse products citing scientific standards. USA Pulses has worked with APHIS and US industry experts to establish scientific standards that enable the export of products including chickpeas.

## Tariff Barriers

Current U.S. pulse exports to China face substantial disadvantages with tariff rates of 15–17.5%, compared to Canadian rates of 7.5% for dry beans and lentils. Notably, Canadian dry peas face a 105% tariff, creating a **strategic opening** for U.S. dry pea exports. Additional 10% tariffs imposed in March 2025 further complicate U.S. market access. While waivers are available, their unpredictability undermines commercial planning. If tariffs were removed, U.S. exports to China could reach **\$70 million annually**, nearly doubling current levels. Restoring consistent market access requires stable tariff policy and improved transparency in the waiver process. The waiving of port fees by both sides following President Trump’s meeting with Chinese Premier Xi Jinping will help the industry export more to China.

### U.S. Pulse Exports to China: Market Year Data and Projections

Export value in millions of dollars (\$M)



Source: USDA FAS data from GATS database (2012-2024). Market Year (June-May)

Note: Projections represent aggregate pulse exports. Individual commodities may experience different impacts based on specific tariff rates and market conditions.