USMEF FACT SHEET ON AGREEMENTS AND FRAMEWORKS WITH SOUTHEAST ASIAN NATIONS

Malaysia imported $584 million worth of beef in the first 8 months of the year, including $70 million from Australia but practically zero from the U.S.

Malaysia imported $188 million worth of pork, including $11.5 million from the U.S. while the EU held a dominant share of 82%.

Having all FSIS inspected U.S. beef and pork facilities eligible for Malaysia will be a tremendous game changer, expanding the market potential from just a handful of plants.

Cambodia imported $11.8 million worth of beef in the first 8 months of the year, including $5.4 million from Australia and $1 million from the U.S. Importers already confirm clearance at zero duty and this should enable further growth.

Cambodia is a small market for imported pork, heavily impacted by trade within the region. We expect only limited opportunities, but elimination of tariffs and certainty on SPS related barriers means that the U.S. industry will be in a favorable position when opportunities arise.

Thailand imported $227 million worth of beef in the first 8 months of the year, including $180 million from Australia, by far its largest supplier. Imports from the U.S. were just $2.9 million, due partly to the 50% tariff disadvantage.

Thailand's pork imports are minimal ($7.8 million, mainly from Spain) because they heavily restrict all import market access, but if the ban on U.S. pork were lifted, there would be meaningful opportunities.

Reported beef exports to **Vietnam** were valued at about $668 million in the first 8 months, including an estimated $22 million from the U.S. while Australia exported $82 million and Canada shipped $52 million, benefiting from their preferential tariffs.

Reported pork exports to Vietnam were valued at about $225 million in the first 8 months, including an estimated $8 million from the U.S. while the EU shipped over $110 million, benefiting from preferential tariffs.

If tariffs were eliminated in line with Vietnam's other trade agreement commitments, and if plant and product registration requirements and offal restrictions were lifted, there would be meaningful opportunities for U.S. beef and pork.

Further Context on the Agreements

USTR and the White House announced trade agreements with Malaysia and Cambodia today, October 26, 2025, and Joint Statements with Vietnam and Thailand.

The agreements with Malaysia and Cambodia are done and will enter into force 60 days after a letter exchange indicates all domestic legal processes have been completed.

For Vietnam and Thailand, this was just the publication of Joint Statements, and details must still be negotiated/agreed. Nonetheless it indicates there is meaningful progress on the earlier announcements for which we had seen no details.

Malaysia already had mostly zero tariffs and those will be maintained. Malaysia has agreed to reduce the 15% tariff on pork sausages to 10% on entry into force; and to immediately eliminate the 10% tariff on "other" sausages. The 10% tariff on other processed pork products also goes immediately to zero.

Most importantly Malaysia is expected to eliminate its plant-by-plant approvals and onerous questionnaires and registration processes. If Malaysia carries through with the agreement, it will accept the FSIS MPI directory, meaning all U.S. plants are eligible.

There is also language on halal, suggesting the potential for progress on those issues. The text is here: *Article 2.9: Halal Certification for Food and Agricultural Products Malaysia shall allow any U.S. Halal certifier designated by JAKIM as meeting Malaysia's Halal requirements, to certify food and agricultural products as Halal for importation into Malaysia without additional requirements.*

Cambodia has already eliminated its 15% tariff on imports of U.S. beef and pork, and has also committed to continued recognition of FSIS as the competent authority (all FSIS inspected facilities on the MPI are eligible) and to adhering to other science based regulations; not imposing SPS-related or import licensing restrictions on U.S. red meat.

Vietnam and Thailand have committed to eliminating most tariffs and resolving SPS barriers but we must wait to see what is included in these agreements. Of course U.S. red meat faces significant barriers, both tariff and non-tariff, in these countries. We repeatedly point to the 50% tariff on U.S. beef exports to Thailand while Australia is at zero; and to the lack of pork access into Thailand. Vietnam's tariffs are lower than Thailand's, but are mostly zero for our competitors, again leaving U.S. red meat at a disadvantage. Restrictions on offal are maintained by both countries and Vietnam has a problematic plant and product registration process as well.

Links to the agreements and joint statements:

Malaysia
Cambodia
Vietnam
Thailand