



FANWOOD CHEMICAL, INC.

219 MARTINE AVENUE, NORTH • P.O. BOX 159 • FANWOOD, NEW JERSEY 07023-0159
(908) 322-8440 • FAX (908) 322-8494 • e-mail: info@fanwoodchemical.com

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September Agrochemical Notes

New Entries: NONE

Imports of Glyphosate, as acid, for the period September through August for the last 8 crop years appear to be as shown below:

	24-25	23-24	22-23	21-22	20-21	19-20	18-19	17-18
August	4,648 MT	12,515 MT	1,706 MT	6,507 MT	7,847 MT	4,611 MT	5,997 MT	3,364 MT
July	8,098 MT	6,716 MT	1,179 MT	8,414 MT	9,178 MT	7,985 MT	2,735 MT	6,562 MT
June	6,310 MT	6,442 MT	1,736 MT	11,592 MT	8,972 MT	6,749 MT	3,495 MT	6,333 MT
May	3,898 MT	7,837 MT	344 MT	12,420 MT	10,110 MT	9,029 MT	4,542 MT	12,307 MT
April	4,895 MT	6,108 MT	2,295 MT	16,267 MT	8,067 MT	5,584 MT	3,241 MT	9,836 MT
March	5,838 MT	8,193 MT	8,142 MT	12,334 MT	7,302 MT	2,927 MT	6,656 MT	10,711 MT
February	10,224 MT	9,831 MT	4,177 MT	11,768 MT	2,311 MT	1,636 MT	3,235 MT	8,601 MT
January	18,556 MT	16,155 MT	10,704 MT	8,908 MT	5,660 MT	8,950 MT	6,100 MT	6,081 MT
December	12,345 MT	11,945 MT	4,358 MT	7,006 MT	5,200 MT	3,800 MT	8,900 MT	7,477 MT
November	10,070 MT	10,965 MT	8,521 MT	9,809 MT	4,700 MT	8,000 MT	6,000 MT	5,900 MT
October	9,693 MT	2,944 MT	4,713 MT	9,417 MT	3,200 MT	8,000 MT	8,100 MT	3,800 MT
September	8,023 MT	2,920 MT	4,018 MT	10,661 MT	4,000 MT	4,700 MT	8,600 MT	4,298 MT
Total	102,598 MT	102,571 MT	51,893 MT	125,103 MT	76,547 MT	71,971 MT	57,511 MT	85,270 MT

Looks like Glyphosate imports exceeded 100,000 MT again for this crop year.

Justice Department: The Justice Department has announced a new task force dedicated to making sure that all of the current tariffs are properly accounted for by importers. You are again reminded that the U.S. Citizen who signs the import declaration is totally responsible for the accuracy of this documentation, regardless of any communications/statements by any foreign national. This responsibility includes being sure that the valuations stated are reasonable and accurate and that any “assists” are included in valuation. “Assists” include intellectual property and any other “value” transferred to the overseas shipper of the goods.

Mexico News: Mexico is considering adding tariffs to countries with which they do not have trade agreements, most especially China, as part of their next budget cycle. Watch this space for more news on this issue.

Japan: On September 4 the President signed an Executive Order establishing a flat rate of 15% on imports from Japan. This rate takes effect on August 7, 2025, so some of our readers may be able to file for a refund of duties paid over the last month if they imported products from Japan.

India: In addition to the fact that President Trump increased the reciprocal tariff on India from 10% to 25%, he also hit them with a 25% tariff for their purchases of Russian Oil it took effect on August 28, 2025. It appears as if negotiations between the U.S. and India for a full-fledged while currently on life support, have a chance for revival.

Exceptions List: The exceptions list (Annex II) was updated on Friday night, September 5. It includes 3 more AIs, Triflumizole, Diflubenzuron and Cymoxamil. It also includes numerous exemptions for chemicals if they are to be consumed in the pharmaceutical industry, subject to individual county agreements. Clearly, PhRMA had a role in these modifications. This list, copy attached, governs both reciprocal and “Russia” tariffs.

Lawsuits: Late on Friday afternoon, August 29, just before our 3 day Labor Day weekend, the Appellate Court in Washington D.C. announced that they had voted 7 to 4 against the Administration. This means that 7 of the 11 judges agreed that the President exceeded his authority when he imposed the Fentanyl and Reciprocal tariffs on our trading partners. They placed a stay on the ruling until mid-October to allow for an appeal to the U.S. Supreme Court.

The Administration and the plaintiffs have filed for an expedited review by the Supreme Court.

The Supreme Court has decided to take the case on an expedited basis. Under this scenario, we could have a final decision before the end of the year, hopefully by early December. Thankfully, they did not take the case into their normal docket as we would then not have had a conclusion until summertime 2026.

Examples of formulated pesticide total tariffs: The below table has been updated to reflect the current circumstances for all of our major trading partners for formulated products.

China	301	Fentanyl	Tariff	Reciprocal	Total	product	US
	25.0%	20.0%	6.5%	10.0%	61.5%	Aromatic	Yes
	25.0%	20.0%	5.0%	10.0%	60.0%	Other	Yes

India	Base Tariff	Reciprocal + Russia	Total	Germany	Base Tariff	Reciprocal	Total
Aromatic	6.5%	50.0%	56.5%	Aromatic	6.5%	8.5%	15.0%
Other	5.0%	50.0%	55.0%	Other	5.0%	10.0%	15.0%

Switzerland	Base Tariff	Reciprocal	Total	Taiwan	Base Tariff	Reciprocal	Total
Aromatic	6.5%	39.0%	45.5%	Aromatic	6.5%	20.0%	26.5%
Other	5.0%	39.0%	44.0%	Other	5.0%	20.0%	25.0%

Japan	Base Tariff	Reciprocal	Total	Israel	Base Tariff	Reciprocal	Total
Aromatic	6.5%	8.5%	15.0%	Aromatic	6.5%	15.0%	21.5%
Other	5.0%	10.0%	15.0%	Other	5.0%	15.0%	20.0%

Korea	Base Tariff	Reciprocal	Total	Vietnam	Base Tariff	Reciprocal	Total
Aromatic	6.5%	15.0%	21.5%	Aromatic	6.5%	20.0%	26.5%
Other	5.0%	15.0%	20.0%	Other	5.0%	20.0%	25.0%

It needs to be noted, that there is substantial formulation capacity in the U.S. which is especially cost effective in instances where there are no, or very low tariffs on the active ingredients. As noted above, all formulated products are subject to all of the levies as none are exempted.

Further, since formulating and Agrochemical is not generally considered a substantial transformation, formulating an imported active ingredient in a third country for export to the U.S. can be especially costly.

It also needs to be noted, for Mexico and Canada, there are no tariffs for formulated agricultural chemicals that meet the USMCA rules of origin. For formulated products, 50% by weight of the active ingredients or ingredients must be originating. If a formulated product does not meet this threshold, then the tariff would likely be whatever the levy is on the country of origin of the AI, plus 25% for Mexico Fentanyl. For Canada, it would be whatever the levy if for the actual country of origin for the AI, plus 35%.

Examples of Active Ingredient tariffs: The below table for a variety of active ingredients has also been updated to reflect current circumstances. The goal of this table is to show the full weight of the tariffs on imports from China as well as the tariff rates for key alternate sources, where they exist:

Key Herbicides		China	China	China	China				
HTS	Base	301	Fentanyl	Reciprocal	China		Alternate	Reciprocal	
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Country	Tariff	Total
2918.99.20.10	6.5%	7.5%	20.0%	10.0%	44.0%	2,4 D	India	50.0%	56.5%
2924.29.47.00	6.5%	25.0%	20.0%	10.0%	61.5%	Acetochlor	USA	0.0%	0.0%
2933.69.60.21	3.5%	7.5%	20.0%	0.0%	31.0%	Atrazine	none		
2926.90.23.00	6.5%	7.5%	20.0%	10.0%	44.0%	Bromoxynil	UK	10.0%	16.5%
2930.90.10.00	6.5%	25.0%	20.0%	10.0%	61.5%	Clethodim	India	50.0%	56.5%
2934.99.15.00	6.5%	none	20.0%	0.0%	26.5%	Clomazone	India	0.0%	6.5%
2918.99.20.50	6.5%	7.5%	20.0%	10.0%	44.0%	Dicamba	India	50.0%	56.5%
2931.59.00.80	3.7%	none	20.0%	10.0%	33.7%	Ethephon	none		
2931.49.00.10	3.7%	none	20.0%	0.0%	23.7%	Glufosinate	India	0.0%	3.7%
2931.49.00.20	3.7%	none	20.0%	0.0%	23.7%	Glyphosate	USA	0.0%	0.0%
2930.90.10.00	6.5%	25.0%	20.0%	10.0%	61.5%	Mesotrione	India	50.0%	56.5%
2933.69.60.21	3.5%	7.5%	20.0%	0.0%	31.0%	Metribuzin	India	0.0%	3.5%
2933.39.23.00	6.5%	none	20.0%	0.0%	26.5%	Paraquat	UK	0.0%	6.5%
2921.49.50.00	6.5%	25.0%	20.0%	0.0%	51.5%	Pendimethalin	India	0.0%	6.5%
2934.99.90.01	6.5%	none	20.0%	0.0%	26.5%	Pyroxasulfone	India	0.0%	6.5%
2924.29.47.00	6.5%	25.0%	20.0%	10.0%	61.5%	S-Moc	Switzerland	39.0%	45.5%
2935.90.75.00	6.5%	none	20.0%	0.0%	26.5%	Sulfentrazone	India	0.0%	6.5%
2921.43.15.00	6.5%	25.0%	20.0%	10.0%	61.5%	Trifluralin	Italy	8.5%	15.0%

It is important to note that there are three items on this list where in actual fact, the dominant source is from domestic production, 2,4 D, Glyphosate and Acetochlor. There are of course many other products that are produced in the USA.

In the case of both 2,4 D and Glyphosate, tariffs are not an issue as they are produced here from U.S. sourced “air, fire & water”. In the case of Acetochlor, and most of the other actives

produced here, the tariffs are a factor since there is often an imported intermediate consumed in the process that is impacted by reciprocal, 301 and or Russia tariffs.

Interestingly, this is not an issue for actives produced in Mexico, since most if not all imported intermediated into Mexico are tariff free, and once a chemical reaction is performed, the resultant product comes into the U.S. under USMCA duty free. Same would be true for Canada.

HTS Numbers	Base Tariff	301 Surtax	Fentanyl Tariff	Reciproca Tariff	China Total	Product	Alternate Country	Reciproca Tariff	Total
Key Insecticide									
2932.20.50.50	Free - K list	none	20.0%	0.0%	20.0%	Abamectin	none		
2930.90.43.95	6.5%	25.0%	20.0%	10.0%	61.5%	Acephate	India	50.0%	56.5%
2916.20.50.00	3.7%	25.0%	20.0%	0.0%	48.7%	Bifenthrin	India	0.0%	3.7%
2933.39.27.00	6.5%	none	20.0%	0.0%	26.5%	Imidacloprid	Germany	0.0%	6.5%
2926.90.16.00	free	25.0%	20.0%	10.0%	55.0%	Lambda Cy	India	50.0%	50.0%
2930.90.43.95	6.5%	25.0%	20.0%	10.0%	61.5%	Oxamyl	Taiwan	20.0%	26.5%
2916.20.50.00	Free - K list	25.0%	20.0%	10.0%	55.0%	Permethrin	India	50.0%	50.0%
Key Fungicides									
2933.59.15.00	6.5%	none	20.0%	0.0%	26.5%	Azoxystrobin	India	0.0%	6.5%
2930.90.43.95	6.5%	25.0%	20.0%	10.0%	61.5%	Captan	Israel	15.0%	21.5%
2926.90.21.00	6.5%	none	20.0%	10.0%	36.5%	Chlorothalonil	none		
2833.25.00.00	1.4%	25.0%	20.0%	10.0%	56.4%	Copper Sulfate	Mexico	0.0%	1.4%
3808.92.24.00	free	25.0%	20.0%	10.0%	55.0%	Mancozeb	India	50.0%	50.0%
3808.92.50.80	5.0%	25.0%	20.0%	10.0%	60.0%	Micronized Sulfur	India	50.0%	55.0%
2934.99.12.00	6.5%	none	20.0%	0.0%	26.5%	Propiconazole	India	0.0%	6.5%
2933.99.22.00	6.5%	none	20.0%	0.0%	26.5%	Tebuconazole	Germany	0.0%	6.5%

USMCA Renewal: It is likely that USTR will post a notice in the Federal Register seeking public comment before the end of September. The comment period will be followed by a public hearing, likely to be held before the end of November. USTR needs to be fully prepared to begin negotiations in earnest early in 2026 to meet the July 1, 2026 deadline for re-confirming the agreement.

If you have been impacted by USMCA, you are urged to get prepared to put your interests on the table. You can be assured that we will be carefully watching the rules of origin, especially the chemical reaction rule in chapter 29, and the content rule in 3808. We will be strongly advocating that the revised agreement permit manufacturing duty drawback back amongst the three parties.

It is expected that these discussions will be contentious, especially in regard to labor and environmental issues. There also will likely be contentious negotiations over the rules of origin, especially in regards to Automobiles and parts.

The Chemical industry needs to be sure that its interests are protected and not overshadowed by other sectors feuding.

Notes:

The updated version of the “Index” which includes import details for all formulated Agrochemical imports in 3808.91, 3808.92 and 3808.93 for July 2025 is attached.

Below, please find value information for the month of July as well as totals for the first seven months of 2022, 2023, 2024 and 2025.

It is important to observe, that the value figures are “customs value” which would include materials entered into Free Trade Zones, but not any freight, forwarding, duty expenses, or China surtaxes.

July 2025 details, as well as the previous 3 years are as follows (000):

	7/2022	7/2023	7/2024	7/2025
3808.91 – insecticides	\$34,267	\$26,450	\$40,371	\$29,194
3808.92 – fungicides	\$44,356	\$42,444	\$30,621	\$15,741
3808.93 – herbicides	\$39,572	\$33,411	\$26,145	\$30,520

7-month totals for the period (000) are shown below:

	2022	2023	2024	2025
3808.91 – insecticides	\$305,813	\$280,511	\$280,058	\$300,610
3808.92 – fungicides	\$538,447	\$541,772	\$387,850	\$324,495
3808.93 – herbicides	\$554,986	\$438,175	\$275,054	\$378,832

Please let us know how we can best be of service.

Very truly yours,

Jim

V.M. (Jim) DeLisi

VMJD: me