



A consortium of

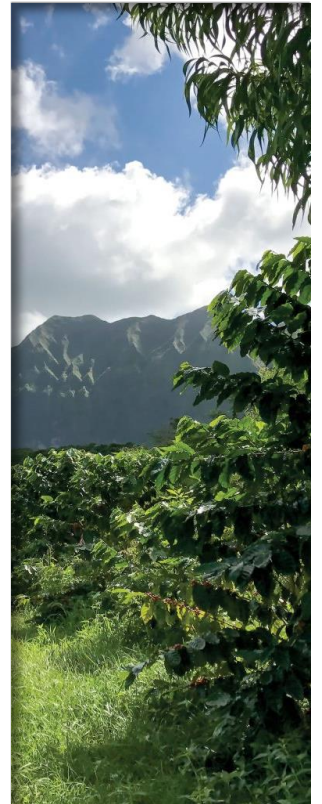
Hawaii Coffee Association

Hawaii Macadamia Nut Association

Hawaii Floriculture & Nursery Association

Hawaii Papaya Industry Association

Hawaii Cacao & Chocolate Association



Tariffs and Hawaii Exports



Tariff

[ˈtər-əf]

A tax imposed by one country on the goods and services imported from another country to influence it, raise revenues, or protect competitive advantages.

 Investopedia

February 1: Tariffs declared on Canada and China, two key Hawaii trading partners

April 2: Trump declares “Liberation Day with tariffs on 180 countries

August 1: Liberation Day tariffs take effect, amounts vary wildly by country, and still changing.

Overall Hawaii Ag Exports

October 16, 2025

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United States Department of Agriculture Foreign Agricultural Service

Area/Partners of Destination
And Commodities Exported

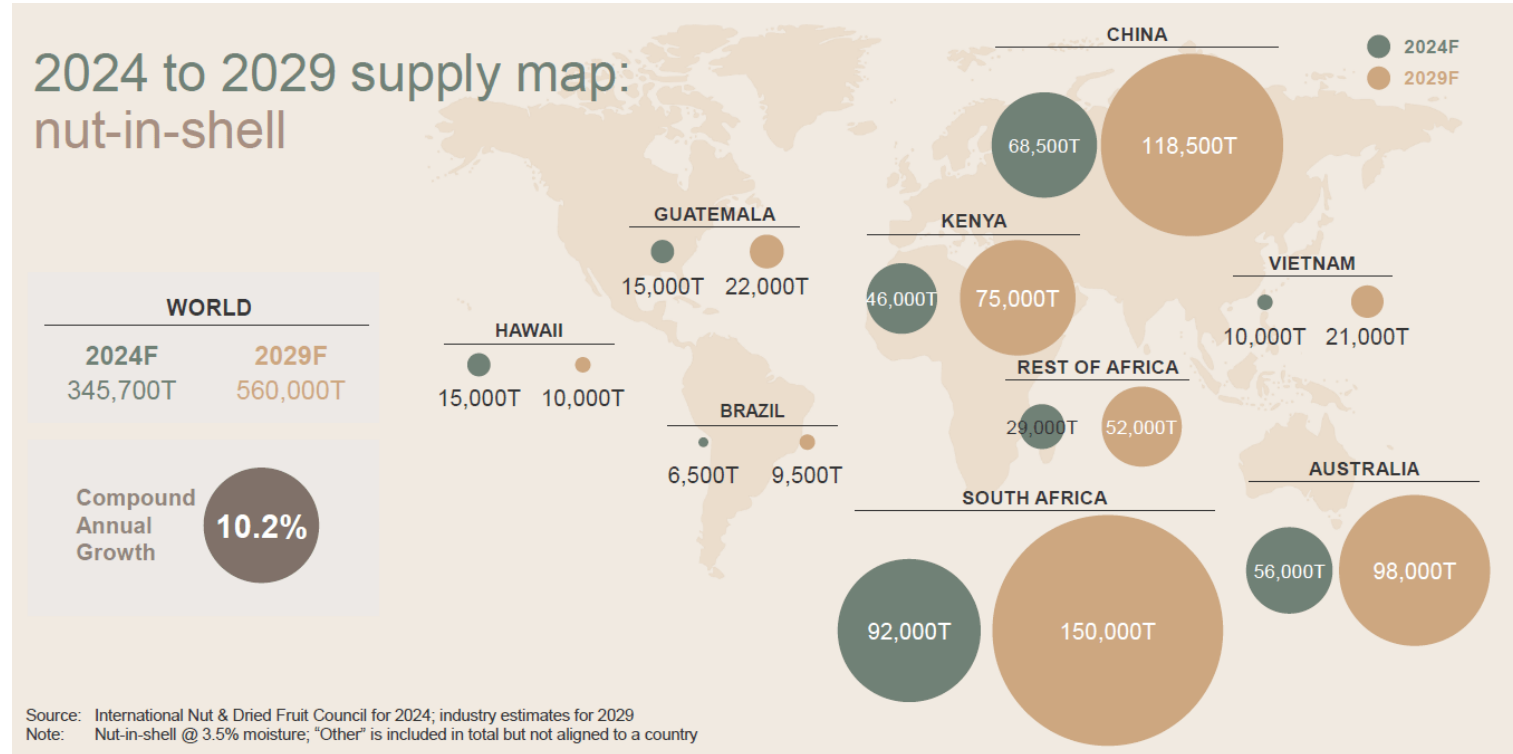
January - December
Cumulative To Date Values in Thousands of dollars
2020 2021 2022 2023 2024 Jan - Jul 2024 Jan - Jul 2025

U.S. State	Partner	Product	Value	Value	Value	Value	Value	Value	Value	Period/Period % Change (Value)
Hawaii	East Asia	Agricultural Total	42,914	51,057	65,470	45,013	41,837	25,787	22,867	-11
Hawaii	North America	Agricultural Total	9,047	10,833	10,536	8,908	10,915	6,063	5,343	-12
Hawaii	Southeast Asia	Agricultural Total	3,796	6,968	6,476	1,794	1,280	583	565	-3
Hawaii	European Union-27	Agricultural Total	1,444	2,662	1,984	1,560	1,268	733	938	28
Hawaii	Oceania	Agricultural Total	1,796	1,242	1,560	1,125	1,046	746	1,210	62
Hawaii	Other Europe	Agricultural Total	1,962	179	100	64	885	832	13	-98
Hawaii	Caribbean	Agricultural Total	0	0	0	10	303	110	0	--
Hawaii	South America	Agricultural Total	596	33	2,591	192	283	71	909	1,186
Hawaii	Middle East	Agricultural Total	38	19	154	4	14	14	11	-24
Hawaii	Central America	Agricultural Total	43	0	59	0	0	0	0	--
Hawaii	Former Soviet Union-12	Agricultural Total	0	0	0	0	0	0	12	--
Hawaii	Sub-Saharan Africa	Agricultural Total	7	5	0	0	0	0	0	--
Hawaii	South Asia	Agricultural Total	21	8	29	12	0	0	0	--
Grand Total			61,663	73,006	88,958	58,683	57,833	34,939	31,869	-9

Notes:

1. Data Source: U.S. Census Bureau Trade Data, U.S. State Export Data
2. Product Group : BICO-HS6
3. See the limitations of the United States State Export Data at http://www.fas.usda.gov/gats/help.htm#USState_Limitations

Macadamia Nut Growth Outlook



Based on the data above, Hawaii's world market share is expected to drop from 4.34% to 1.79% between 2024 and 2029. Among the world's nine commercially producing areas, Hawaii currently ranks seventh. By 2029, Hawaii is expected to drop to no. 8.

Mac Nut Tariff Overview

China Tariff

- Australia nuts, range from zero to 5%
- Hawaii nuts 22% tariff
 - 50% of Hawaii nuts historically go to China

Canada Trade

- No tariff on macs but strong aversion to US-grown products
 - 2025 Sales down 32% over same period in 2024

US Mainland Trade

- Foreign Kernel 30% cheaper, impacting Hawaii growers significantly
- Doubling of input costs for packaging
- Snack Market is tanking, slowing imports and usage of macs
 - In effect, diverting sales into a crowded global market

Macadamia Exports

October 16, 2025

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United States Department of Agriculture
Foreign Agricultural Service

Area/Partners of Destination And Commodities Exported			January - December								
			Cumulative To Date Values in Thousands of dollars								
			2020	2021	2022	2023	2024	Jan - Jul 2024	Jan - Jul 2025		
U.S. State	Partner	Product	Value	Value	Value	Value	Value	Value	Value	Value	Period/Period % Change (Value)
Hawaii	World Total	Tree Nuts	7,577	11,721	17,905	9,972	12,212	7,482	6,249		-16
Grand Total			7,577	11,721	17,905	9,972	12,212	7,482	6,249		-16

Notes:

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Coffee Tariff Overview

Overall Market

- Coffee is a staple foodstuff, AND a luxury good.
- Incoming tariffs and Brazil drought driving record C-Market prices
 - Retail commodity pricing doubling or tripling
 - Roasters have smaller budgets for rare beans such as Hawaii

Retaliatory Tariffs

- Canada: 25% on green coffee
- China: 22% on green and roasted

Timing of Sales

- Hawaii harvest just now coming available, full impact is pending.
- Hesitancy by wholesalers to book 12 month contracts
- Mainland industry worth \$343 billion, lobbying hard against tariffs

Coffee Exports

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Area/Partners of Destination And Commodities Exported			January - December Cumulative To Date Values in Thousands of dollars									
			2020	2021	2022	2023	2024	Jan - Jul 2024	Jan - Jul 2025			
U.S. State	Partner	Product	Value	Value	Value	Value	Value	Value	Value	Value	Value	Period/Period % Change (Value)
Hawaii	World Total	Coffee, Roasted and Extracts	4,542	4,862	5,726	3,886	3,768	2,482	2,635			6
Hawaii	World Total	Coffee, Unroasted	6,136	6,851	7,470	6,005	3,700	3,164	1,230			-61
Grand Total			10,678	11,713	13,196	9,891	7,468	5,646	3,865			-32

- Notes:**
- 1. Data Source: U.S. Census Bureau Trade Data, U.S. State Export Data
 - 2. Product Group : BICO-HS6
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Bottom Line

Trade policy is defining the future of premium agricultural exports. While Hawaii farmers face headwinds from tariffs and limited growth, other countries are scaling up, entering new markets, and reaping the rewards of smart policy alignment.

USDA FAS Funding for Hawaii Crops

- Generic annual funding for overseas marketing and promotional activities that help build commercial export markets for U.S. ag
- SHAC is an official Cooperator
 - ALL Federal funds must be spent on activities
 - Requires a 10% cash plus 40% in-kind copay
- Regional Ag Promotion Program (RAPP) : Activities through 2030
 - \$1.35 million for Taiwan, Dubai, Japan, South Korea marketing
 - Coordination with DBEDT and HDAB
- USDA FAS Market Access Program 2025: activities through 2025:
 - \$210,000 for China, Taiwan and Canada

USDA and USAID Funding

Twice frozen but now cleared

- USDA NIFA Specialty Crop Research Initiative: Coffee Leaf Rust response research through August 2026
 - \$2.6 mil approx. remaining

USAID RIP: But still fighting to find a home for R&D

- USAID: Soil fertility in Hawaii and Guatemala killed
 - \$500,000 to SHAC and ARS PBARC for Year One of Five
- USAID/Cornell University Crop Improvement Innovation Lab killed
 - \$6 million for Breeding Improvements on CLR resistant trees
- RFP USAID Innovation Lab on Perennial Crops was due in March: killed
 - \$5 million potentially to UH for Coffee and Cacao research

