



american
seed trade
association



SEED

A Global Industry

International trade and global movement of seed is critical to the success of the U.S. seed industry and agricultural economy, U.S. farmer productivity, and national food supply. ASTA's priorities for expanding U.S. exports and improving market access include: 1) eliminating tariffs; 2) strengthening intellectual property rights for seeds and related technologies; 3) eliminating non-tariff barriers to trade by promoting science-based phytosanitary measures; and 4) streamlining pathways to market for plant breeding innovations (PBI) like genome editing.

Trade Builds Export Opportunities and is Necessary for U.S. Research and Development

Unlike other agricultural goods, which are traded primarily for immediate use or processing in food and feed, the seed sector relies on trade for both commercial sales and as a fundamental component of years-long research and development (R&D) pipelines. Counter seasonal production allows the seed sector to increase the speed of breeding during U.S. winter months by producing seed in warmer locations. Seeds must be produced in specific environments that are free from pests and diseases that are

detrimental to U.S. agriculture, or in specific latitudes with daylight hours that trigger plants to flower — and thus produce seeds. The extensive R&D required to release a new crop variety can take as long as 10-15 years, even with the best technologies and trade at our disposal to shorten the process. **Any actions that increase costs facing the seed sector, or that slow the ability to trade and test seeds between countries, could further delay U.S. farmers' access to improved varieties for many important crops.**

U.S. Seed Exports by the Numbers:



Total 2024 U.S. Ag Exports:
\$176 BILLION

Total 2024 U.S. Seed Exports:
\$1.7 BILLION

The most common U.S. seed exports include corn, vegetable, grass and forage, pulse, and soybean seed.

Top Seed Exporting States:

- Arizona
- California
- Idaho
- Illinois
- Iowa
- Michigan
- Minnesota
- Oregon
- Texas
- Washington

Top U.S. Export Markets for Seeds:

- Canada
- Mexico
- EU
- China
- Japan
- South Korea
- Argentina
- Chile

U.S. Seed Industry Supports Trade Agreements

Trade agreements are an important mechanism to promote ongoing, bilateral engagement and encourage countries to adopt and enforce policies that align with the United States. The U.S.-Mexico-Canada Agreement (USMCA) established robust obligations related to agricultural biotechnology, phytosanitary, and intellectual property issues of importance to U.S. seed exports. ASTA members strongly support renewing USMCA in

July 2026 and see opportunities to strengthen provisions related to regulatory cooperation and intellectual property in order to spur continued investment in the United States. The U.S. seed sector supports continued efforts to establish trade agreements, using provisions from USMCA as a model, with trading partners in key markets across the globe.

U.S. Seed Industry Position on Tariffs

The U.S. seed industry is highly specialized and diversified, selling hundreds of varieties of seeds across numerous species. In 2024 alone, the American seed sector exported seeds to over 100 export markets under 80 tariff codes for planting seeds, “or seeds of a kind for sowing,” in chapters 07, 10, and 12 of the Harmonized Tariff Schedule.

Current tariffs (and retaliatory tariffs) between the United States and our trading partners are having a negative impact on the U.S. seed sector and our downstream customers – farmers and gardeners. In the short-term, the current uncertainty arising from trade tensions leaves perishable seed shipments vulnerable to delays at major ports of entry, prevents U.S. companies from being able to compete in important markets, and in the most

extreme cases, could lead to an American farmer missing the planting season for their crop. In the long-term, tariffs add escalating costs to R&D as U.S. companies move seed back and forth to necessary growing environments within their breeding programs. Due to the importance of trade for seed production, if tariffs remain or increase, companies may be forced to relocate key aspects of their business or bypass R&D investment in the United States altogether.

To maintain the United States’ competitive edge within the seed sector and deliver innovative solutions to farmers, U.S. seed companies rely on reduced or eliminated tariffs on seed for both imports and exports. ASTA firmly supports a renewal of exclusions or re-instating an exclusion request process.

U.S. Leadership in International Bodies Remains Key

Continued U.S. funding, leadership, and engagement in major international organizations is critical for securing the future of U.S. agricultural exports. ASTA members remain strongly supportive of maintaining U.S. leadership on global policies that impact seed, and our priority organizations include: international standard setting bodies for sanitary and phytosanitary (SPS) measures, Codex Alimentarius Commission (Codex) and the International Plant Protection Convention (IPPC); venues negotiating intellectual property provisions, such as the Union for

the Protection of Plant Varieties (UPOV), the World Intellectual Property Organization (WIPO), and International Treaty on Plant Genetic Resources for Food and Agriculture (ITPGRFA); and global bodies responsible for trade and agricultural negotiations, such as the World Trade Organization (WTO), United Nations Food and Agriculture Organization (FAO), and Organization of Economic Co-operation and Development (OECD) Secretariat for Seed Schemes.

USDA Cooperator Programs Support U.S. Agricultural Exports

ASTA participates in USDA’s Market Access Program (MAP) and Foreign Market Development (FMD) Cooperator Programs, which are both funded through the Farm Bill to promote the expansion of U.S. agricultural exports in existing and emerging markets. The grant programs are matched with private sector dollars to enhance market access for the U.S. seed industry, and these programs have supported ASTA’s advocacy overseas to prevent market loss from regulatory barriers and open future markets for U.S. seed exports across the globe. Export promotion continues to expand U.S. agricultural exports, protect and create American jobs, strengthen farm income, and help offset the government supported advantages afforded to international competitors. ASTA supports continued Farm Bill authorization and expansion of these public-private partnerships, and we encourage robust investment in USDA trade promotion programs.

International and Trade Priorities for the U.S. Seed Industry

- **Maintain U.S. leadership in plant breeding and agricultural innovation.**
- **Removal of tariffs on seed movement.**
- **Encourage adoption of harmonized global standards.**
- **Leverage trade agreements to align global policies to the United States.**
- **Expand U.S. export markets through robust Farm Bill funding for USDA Cooperator Programs.**

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