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Improvement of Vietnam's Policies on Agricultural Exports in Context of U.S. Reciprocal Tariffs

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ABSTRACT

The imposition of reciprocal tariffs by the United States has significantly impacted Vietnam's agricultural export sector, challenging its trade stability and policy responsiveness. This study aims to review and assess Vietnam's existing agricultural export policies in light of these external shocks, while proposing improvements to enhance competitiveness and resilience. By employing content analysis as the primary research methodology, the paper systematically examines relevant laws, government decisions, trade agreements, and policy reports issued by key institutions. The research is framed within three theoretical perspectives: trade policy theory, global value chain (GVC) theory, and institutional theory. These frameworks are used to explore the external policy tools available, Vietnam's position in international supply chains, and the institutional capacity to adapt to changing trade environments. Findings indicate that Vietnam's current policy framework remains fragmented and reactive, with limited coordination among ministries, underdeveloped value-added strategies, and weak institutional mechanisms for export promotion and enforcement. The study emphasizes the importance of integration of agricultural policy strategically with trade diplomacy, institutional reform, and value chain upgrading. Ultimately, the paper suggests that a more comprehensive and proactive policy approach—grounded in international economic theory and supported by effective governance—will be essential to safeguard and strengthen Vietnam's agricultural exports in the evolving global trade landscape.

Keywords: Agricultural Exports; Trade Policy; U.S. Trade Policy.

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1. Introduction

In the context of deepening globalization and economic integration, agricultural trade plays a vital role in the development strategy of many countries, especially those whose economies are heavily reliant on exports, such as Vietnam. The United States is currently one of Vietnam's largest export markets for agricultural products, accounting for a significant share of the country's annual agricultural export turnover. However, recent shifts in U.S. trade policy, particularly the implementation of reciprocal tariffs, have posed considerable challenges to Vietnam's agricultural exports.

Reciprocal tariffs pose a unique and significant challenge for Vietnam, given its export-oriented economy, which is heavily reliant on access to the U.S. market. Unlike other tariff structures, reciprocal tariffs are specifically designed to match the tariffs imposed by the target country. This creates a situation where Vietnam's agricultural exports face substantial cost increases, potentially leading to reduced competitiveness and market share losses in the U.S. At the same time, Vietnam's existing export policies remain limited in both legal substance and practical effectiveness, resulting in poor adaptability and reduced competitiveness of Vietnamese agricultural goods in the U.S. market.

Current academic studies on Vietnam's agricultural exports to the U.S. primarily focus on market analysis, competitiveness assessments, or isolated examinations of trade remedy measures. However, comprehensive research on Vietnam's export policies about the U.S. reciprocal tariff framework is still lacking. This gap highlights the need to review, refine, and enhance Vietnam's export support policies, particularly in light of an increasingly complex and unpredictable global trade environment. This thereby answers the question of the impact of the U.S. reciprocal tariffs on Vietnam's agricultural export activities and how Vietnam needs to adjust its agricultural export policies. Furthermore, there are some recommendations for Vietnam to limit difficulties and challenges, taking advantage of opportunities to promote agricultural exports.

This study aims to analyze Vietnam's current policies on agricultural exports to the U.S. market, assess their compatibility and effectiveness in the context

of U.S. reciprocal tariffs, and propose policy improvements to enhance flexibility, proactiveness, and compliance with international trade regulations. The findings indicate that while some existing policies have yielded initial positive impacts, Vietnam still requires strategic and long-term policy adjustments to mitigate adverse effects and better leverage opportunities in the U.S. market.

2. Theoretical Framework

To effectively analyze and propose appropriate policies for improving Vietnam's agricultural export performance amid the impact of the U.S. reciprocal tariffs, this study adopts three key theoretical approaches: Trade Policy Theory, the Global Value Chain (GVC) Theory, and Institutional Theory. These frameworks provide complementary perspectives on the interaction between international trade dynamics, global production structures, and domestic institutional capacities.

2.1. Trade Policy Theory

Trade policy theory serves as a foundation for understanding the objectives and implications of government interventions in international trade. Classical theories, such as Ricardo's theory of comparative advantage, explain the benefits of specialization in production ^[1]. Modern extensions, such as strategic trade policy proposed by Krugman, emphasize the role of government in using tools like tariffs, subsidies, and trade defense measures to protect or enhance the competitiveness of domestic industries ^[2].

In the context of rising protectionism and the imposition of reciprocal tariffs by the U.S., this theory is beneficial for assessing the impact on Vietnam's agricultural exports and for guiding response measures, such as adjusting subsidy schemes, improving trade logistics, or negotiating bilateral and multilateral trade agreements. It provides a basis for evaluating the adaptability of Vietnam's trade policy in a volatile global environment.

2.2. Global Value Chain (GVC) Theory

GVC theory offers a structural perspective on in-

ternational trade, emphasizing the fragmentation of production and the coordination among actors across countries. According to Gereffi, Humphrey, and Sturgeon, value is created and distributed across various stages of production, from raw materials to end consumers ^[3]. In Vietnam, agricultural exports, including rice, seafood, and coffee, are increasingly integrated into global value chains but are often concentrated in low-value-added stages, such as raw production or basic processing.

Amid U.S. tariff retaliation, GVC theory helps identify upgrading strategies for Vietnam's agricultural sector, such as moving toward processed products with clear branding and traceability. The theory also underscores the importance of compliance with international standards and the flexibility of supply chains in responding to market disruptions.

2.3. Institutional Theory

Institutional theory focuses on the influence of formal rules (laws, regulations) and informal norms (customs, practices) on organizational behavior and policy outcomes ^[4,5]. In the context of agricultural exports, this theory highlights the role of domestic institutions, such as customs authorities, trade promotion agencies, and agricultural cooperatives, in ensuring effective policy implementation and the ability to respond to global trade shifts.

A strong institutional system enables timely policy adjustments, fosters public-private cooperation, and reduces transaction costs. Conversely, institutional weaknesses may hinder prompt responses and diminish export opportunities. Institutional theory thus underscores the importance of governance reforms, institutional capacity building, and increased transparency in export policy environments.

These three theoretical approaches provide a multi-dimensional lens for analyzing Vietnam's agricultural export policies under the impact of U.S. reciprocal tariffs. While trade policy theory emphasizes external regulatory tools and negotiation strategies, GVC theory identifies opportunities for restructuring value within global supply chains. Institutional theory, in turn, focuses on internal capacities and the effectiveness of policy im-

plementation. Integrating these perspectives supports a comprehensive, evidence-based approach to enhancing the adaptability and global competitiveness of Vietnam's agricultural sector.

3. Research Methodology

3.1. Research Approach: Content Analysis

This study employs a qualitative content analysis method to examine and assess the evolution of Vietnam's agricultural export policies within the context of U.S. reciprocal tariffs. The purpose of this approach is to systematically interpret and synthesize policy documents, empirical studies, and official reports to generate insights into current challenges and propose viable policy improvements.

3.2. Data Sources

The content analysis is conducted based on a wide range of primary and secondary data sources, including but not limited to:

- Theoretical literature on global value chains, strategic trade policy, and institutional economics ^[1,2,3].
- Empirical research and academic publications ^[2,3].
- News reports and institutional analyses on trade relations and tariff impacts ^[3,4,5].
- Official U.S. and Vietnamese government documents ^[6,7].
- WTO agreements and trade policy frameworks ^[8].

3.3. Analytical Framework

The content analysis follows a structured framework that includes the following key components:

3.3.1. Mapping U.S. Tariff Policies

The study reviews the structure and evolution of U.S. tariff schedules, especially in the context of Section 232 and 301 investigations ^[6,7]. Key changes in tariff rates and product coverage are examined to understand the policy rationale and implications for trading partners such as Vietnam.

3.3.2. Analyzing the Global Impact of the US-China Trade War

Drawing on trade-related content from institutional analyses and economic studies ^[1,3,5], the study examines how the escalation of the US-China trade war has impacted global markets, value chains, and third-party exporters, including Vietnam.

3.3.3. Evaluating Vietnam's Current Export Policy Framework

The research analyzes Vietnamese policy responses and trade strategies based on official government reports and trade briefings. The goal is to assess existing strengths, weaknesses, and institutional limitations in adapting to U.S. trade actions.

3.3.4. Measuring the Impact of U.S. Tariffs on Vietnam's Agricultural Exports

Through comparative and thematic review of data from government sources, trade institutions, and academic studies, the study assesses changes in:

- Export volumes to the U.S.
- Agricultural product structure
- Market access conditions and value chain participation

3.3.5. Proposing Policy Recommendations

Based on the synthesized findings, the study identifies critical gaps and formulates policy recommendations aimed at enhancing Vietnam's resilience and competitiveness in the U.S. market. These recommendations are grounded in institutional theory ^[1,3,5], global value chain theory ^[1,6], and strategic trade policy ^[2,8].

3.4. Analytical Procedure

The process of content analysis involves the following steps:

- (1) Data collection: Compilation of relevant policy texts, trade data, news articles, and peer-reviewed publications.
- (2) Coding and categorization: Textual content is coded thematically based on policy areas (e.g., tariff measures, export incentives, market access).

cess).

- (3) Interpretation: Thematic data are interpreted in light of theoretical frameworks and empirical findings.
- (4) Synthesis and recommendations: Key findings are synthesized to generate evidence-based policy suggestions.

3.5. Justification for Method Selection

The content analysis method is particularly suitable for this research due to:

- The complexity and multidimensional nature of trade policy and international relations.
- The need to integrate perspectives from legal texts, policy reports, and economic analysis.
- Its capacity to reveal both explicit policy responses and underlying institutional dynamics affecting Vietnam's trade performance.

4. Research Results and Discussion

4.1. The Content of the Current U.S. Tariff Policy

The United States maintains a complex and adaptive tariff system that reflects its strategic economic interests, international obligations, and domestic policy priorities. U.S. tariff policies are primarily administered by the Office of the United States Trade Representative (USTR) and the U.S. Customs and Border Protection (CBP), with duties implemented according to the Harmonized Tariff Schedule (HTS) ^[6]. These tariffs serve not only as fiscal tools but also as instruments to enforce trade policy.

In recent years, particularly following the implementation of Section 232 of the Trade Expansion Act of 1962 and Section 301 of the Trade Act of 1974, the U.S. has increasingly adopted reciprocal tariff measures. These measures are intended to address perceived unfair trade imbalances and promote the principle of "fair trade" ^[7]. Under such provisions, retaliatory tariffs are imposed on imports from trading partners accused of engaging in unfair trade practices, such as excessive subsidies, limited market access, or the use of non-tariff barriers.

Regarding agricultural products, the U.S. tariff system operates under the Most-Favored Nation (MFN) principle for WTO members, while allowing for discretionary adjustments through special safeguards and trade remedy mechanisms^[8]. Agricultural import tariffs vary by product category and country of origin and are frequently adjusted through bilateral or multilateral negotiations, or in response to domestic agricultural concerns^[9].

Vietnam's agricultural exports to the U.S., including products such as catfish, shrimp, and various fruits, have been subjected to scrutiny under Section 301 investigations and have faced anti-dumping and countervailing duty measures^[10]. These tariffs and related non-tariff barriers are often justified by the U.S. on the grounds of ensuring food safety, preventing unfair pricing, or protecting domestic producers.

The concept of "reciprocal tariffs," although not formally recognized under WTO rules, has been actively promoted under recent U.S. trade administrations. It emphasizes that trading partners should apply tariff rates that are comparable to those of the U.S., or risk facing higher tariffs on their exports to the American market^[7]. This approach has influenced bilateral trade

negotiations, particularly with developing countries such as Vietnam.

The current direction of U.S. tariff policy signals a shift toward more assertive and conditional trade practices, especially in the agricultural sector. These developments present both challenges and strategic opportunities for Vietnam's agricultural export strategy. Consequently, Vietnam must adopt comprehensive policy responses to ensure sustained market access, comply with U.S. trade regulations, and enhance the competitiveness of its agricultural products^[6,10].

Table 1 shows the current U.S. tariff policy on agricultural imports from Vietnam, a notably high total tariff rate of 56%, effective as of April 9, 2025. This total consists of a baseline tariff of 10%, applicable to most imported goods globally, combined with a reciprocal tariff of 46%, which specifically targets Vietnamese products based on the tariff rates Vietnam applies to U.S. exports. Such a high cumulative tariff reflects a retaliatory policy aimed at balancing trade relations between the two countries. This elevated tariff level poses significant challenges to the competitiveness of Vietnamese agricultural exports in the U.S. market, especially in the context of rising production and logistics costs.

Table 1. Current U.S. tariff policy on Vietnamese agricultural imports.

Tariff Type	Rate (%)	Effective Date	Notes
Baseline Tariff	10%	5-Apr-25	Applied to most imported goods from all countries.
Reciprocal Tariff	46%	9-Apr-25	Specifically imposed on Vietnam, based on the tariff Vietnam applies to U.S. goods.
Total Tariff on Vietnam	56%	9-Apr-25	Combined rate of baseline and reciprocal tariffs.

Source: Frasers Law Company Vietnam (2024). Reciprocal tariffs and their strategic implications.

Table 2. U.S. reciprocal tariff rates on selected Southeast Asian Countries (as of April 2025).

Country	Reciprocal Tariff Rate (%)
Cambodia	49%
Laos	48%
Vietnam	46%
Thailand	36%
Indonesia	32%
Malaysia	24%

Source: Frasers Law Company Vietnam (2024). Reciprocal tariffs and strategic implications.

Table 2 reveals that the reciprocal tariff rates imposed by the United States on several Southeast Asian countries as of April 2025 create a relative disadvantage for Vietnam. The 46% reciprocal tariff rate applied to Vietnamese exports is higher compared to neighboring countries such as Indonesia and Malaysia, which face rates of 32% and 24%, respectively. This disparity suggests an asymmetry in trade relations and tariff policy toward Vietnam, potentially resulting from inconsistent Vietnamese tariff policies on U.S. imports or the lack of effective bilateral free trade agreements. Consequently, this may result in a loss of market share for Vietnam in the competitive U.S. agricultural market compared to regional rivals.

4.2. Impact of the US-China Trade War on the Global Market

The trade war between the United States and China, which began in 2018, has triggered significant disruptions and widespread economic impacts globally. This conflict primarily stems from disputes over trade policies, intellectual property rights, and a significant trade imbalance between the world's two largest economies ^[11]. The United States imposed a series of tariffs on Chinese imports, which were met with reciprocal measures from China. These retaliatory actions have significantly disrupted global supply chains, especially in sectors such as manufacturing, processing, and agricultural exports ^[12].

In response to these new tariff barriers, many international businesses were forced to restructure their

supply and distribution networks. As a result, production and logistics costs increased, leading to reduced economic efficiency and weakened competitiveness among exporting countries ^[13]. The structure of global trade has shifted as U.S. firms have sought alternative supply sources outside of China to avoid high tariffs. This shift has created new opportunities for Southeast Asian countries, particularly Vietnam, to become attractive destinations for foreign investment and export-oriented production ^[14].

Vietnam has capitalized on this trade diversion to expand its share in the U.S. agricultural market and other global markets. Moreover, reciprocal tariffs have directly influenced international commodity prices. Products subjected to tariffs tend to have higher prices, which dampens purchasing power and alters consumer behavior. In agriculture, the U.S. tariffs on Chinese farm goods have driven prices upward, thereby enabling countries like Vietnam to enhance their export volumes ^[11,15].

The U.S.-China trade war has also prompted Vietnam to adjust its trade and export policies to navigate this evolving landscape. Vietnam must both seize emerging opportunities and develop effective trade defense strategies to protect its exports from potential tariff actions by major partners. Additionally, this context has accelerated institutional reform, promoted improvements in product quality, and fostered the diversification of export markets, crucial factors for the sustainable development of Vietnam's agricultural exports ^[14,15].

Table 3. Global supply chain disruption (2023- 2024).

Indicator / Event	Value / Change Rate	Data Source
Global Supply Chain Pressure Index (GSCPI)	Decreased from -0.17 (March 2025) to -0.29 (April 2025)	Trading Economics
Number of global supply chain disruption events	Increased by 38% in 2024 compared to 2023	Resilinc
Main causes of disruptions	Factory fires, labor strikes, business sales, leadership changes, mergers & acquisitions	DC Velocity

Table 3 highlights a significant increase in global supply chain disruptions in 2024. Although the Global Supply Chain Pressure Index (GSCPI) slightly decreased, the 38% rise in disruption events indicates that risk

levels remain elevated. For Vietnam, a country heavily reliant on exports—particularly in the agricultural sector—disruptions caused by strikes, factory fires, and corporate restructuring pose serious threats to delivery

capability, lead times, and logistics costs. These findings underscore the necessity for Vietnam’s export policies to incorporate robust supply chain risk management and enhance adaptability to external shocks.

Table 4. Changes in global trade structure (2022 - 2023).

Category	Rate / Value	Data Source
Share of goods in global trade	Dropped from 77.8% (2022) to 75.3% (2023)	WTO
Share of services in global trade	Rose from 22.2% (2022) to 24.7% (2023)	WTO
Projected global trade decline	5% reduction in 2023 (approx. USD 2 trillion)	UNCTAD

Table 4 reveals a structural shift in global trade, with a declining share of goods and a growing prominence of services. For Vietnam’s agricultural exports, which are commodity-based, this transition introduces new challenges in maintaining competitiveness. The projected 5% contraction in global trade reflects shrinking market demand, which may further constrain Vietnam’s agricultural exports to the U.S. This context calls for export policy reforms that emphasize product quality enhancement, market diversification, and the integration of value-added services such as logistics, traceability, and certification in agricultural trade.

Vietnam is rising comparative advantage as a substitute supplier in key sectors. However, this forecast is based on the assumption that external conditions remain unchanged. To translate this opportunity into actual economic gains, Vietnam must proactively reform its export policies, especially in the agricultural sector, where products are highly vulnerable to U.S. tariffs and non-tariff trade barriers.

To address this, Vietnam should prioritize the following:

- Enhancing compliance with U.S. regulatory standards related to food safety, traceability, and packaging for agricultural products.
- Capitalizing on global supply chain realignments by attracting FDI in agricultural processing and value-added sectors.
- Engaging in bilateral trade diplomacy aimed at reducing non-tariff barriers for high-potential commodities such as coffee, rice, cashew nuts,

and tropical fruits.

Moreover, the development of a real-time data platform for U.S. market analysis is critical to help policy-makers and exporters anticipate and respond to shifts in trade flows and tariff regimes. These measures would position Vietnam to convert potential trade diversion into sustainable agricultural export growth in the context of rising protectionism.

4.3. To Clarify the Current State of Vietnam’s Agricultural Export Policies and Identify Existing Limitations in Response to the Reciprocal Tariff Measures Imposed by the United States

In recent years, Vietnam has implemented various trade promotion policies to support agricultural exports, including national trade promotion programs, international exhibitions, and conferences. These initiatives aim to enhance the visibility of Vietnamese agricultural products in global markets, build trade partnerships, and create favorable conditions for exporters to access new customers. For instance, national trade promotion programs often include financial support for participation in overseas trade fairs, marketing campaigns, and training for exporters on international market requirements. International exhibitions and conferences offer crucial platforms for Vietnamese businesses to showcase their products, engage with buyers, and stay informed about emerging market trends and evolving consumer preferences.

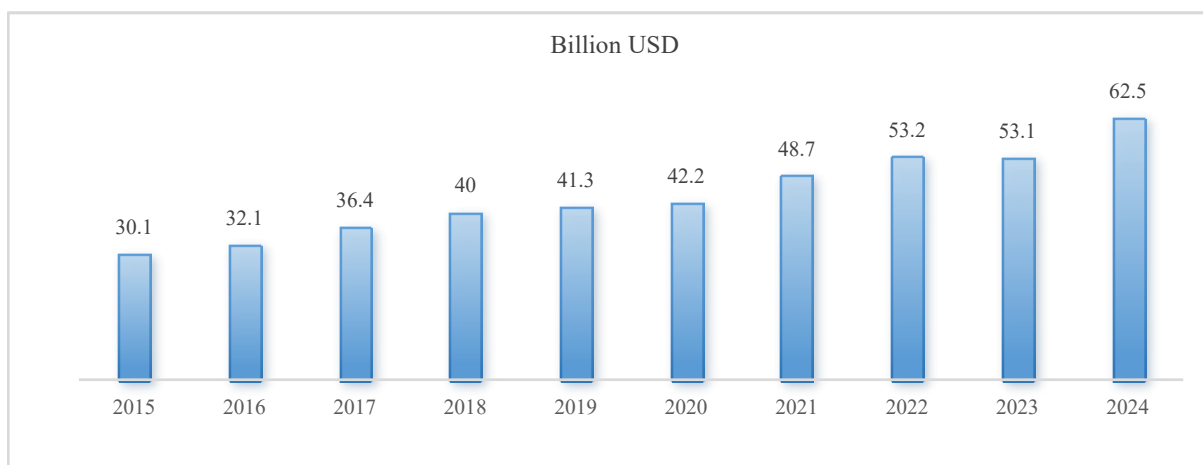


Figure 1. Vietnam's agricultural exports 2015-2024.

Source: VIOIT

During the 2015–2024 period, Vietnam's agricultural exports increased at a relatively high average annual rate of 6.8%. Vietnam's total agricultural exports have more than doubled over the past decade, from 30.1 billion USD in 2015 to 62.5 billion USD in 2024 (**Figure 1**). The signing of a series of Free Trade Agreements (FTAs) has created a solid foundation, helping

to promote breakthrough growth in Vietnam's agricultural exports. In addition, overcoming drought and salinity, as well as developing raw material areas linked to processing and expanding markets, has created momentum for Vietnam's agricultural exports to develop sustainably.

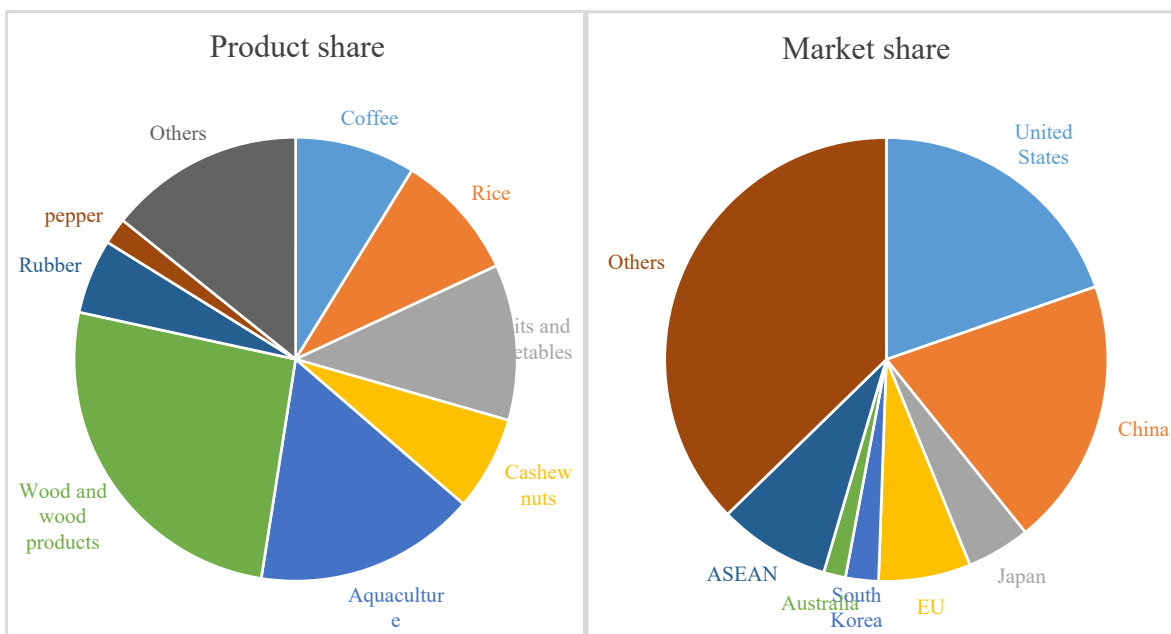


Figure 2. Product and market share of Vietnam's agricultural exports in 2024.

Source: VIOIT

Vietnam's agricultural exports have grown strongly thanks to the restructuring process, the application of science and technology in production, processing, and

the expansion of raw material areas. The promotion of high-value-added exports, such as vegetables and processed seafood, has helped increase the overall export

value. Favorable conditions in major markets and sharp increases in prices of many agricultural products have created opportunities for Vietnam to expand exports (**Figure 2**).

However, despite these efforts, the overall impact remains constrained by several factors. The policies tend to lack strategic depth and long-term orientation, with many initiatives being project-based or reactive rather than part of a comprehensive export development strategy. This fragmented approach limits the ability to build sustained competitive advantages in key markets such as the United States, where market entry barriers and consumer expectations are high ^[9]. Moreover, Vietnam's agricultural export sector faces significant challenges related to quality control and food safety. Although progress has been made in aligning policies with international standards such as Codex Alimentarius and Global GAP, enforcement remains inconsistent. Weak coordination among inspection bodies, certification agencies, and exporters often leads to delays in certification processes and lapses in compliance ^[11,12].

Such gaps in the regulatory and quality assurance framework have tangible consequences. They increase the likelihood of shipment rejections at ports of entry, which not only cause financial losses but also damage the reputation of Vietnamese products abroad. Additionally, non-compliance with technical regulations and sanitary and phytosanitary standards can trigger the imposition of higher tariffs or non-tariff barriers by importing countries, including the United States. These measures further complicate market access and raise the cost of doing business for exporters, reducing their competitiveness. To overcome these challenges, there is a critical need for enhanced coordination between government agencies and more substantial capacity-building efforts aimed at improving inspection and certification systems, as well as educating exporters on compliance requirements.

Vietnam currently offers several tax and credit incentive policies to support exporters, such as preferential corporate income tax rates and low-interest loans. These incentives are designed to reduce the financial burden on exporters and encourage investment in production capacity and technology upgrades. Preferential tax rates can significantly improve profit margins, while

access to low-interest loans helps businesses manage cash flow and fund expansion activities. Additionally, various credit guarantee schemes have been introduced to help exporters, particularly smaller firms, secure financing from banks with more lenient collateral requirements.

However, despite these available incentives, small and medium-sized enterprises (SMEs), which constitute the majority of agricultural exporters in Vietnam, often face significant difficulties in accessing these benefits. The complexity and bureaucracy involved in application processes, coupled with inconsistent implementation at local levels, create barriers for SMEs. Many of these businesses lack the necessary resources and expertise to navigate administrative procedures effectively, resulting in underutilization of support programs ^[8]. Moreover, limited transparency and information dissemination further exacerbate these challenges, making it difficult for SMEs to capitalize on government incentives fully.

Furthermore, Vietnam has actively engaged in numerous free trade agreements (FTAs) such as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the EU-Vietnam Free Trade Agreement (EVFTA) to expand its export markets. These FTAs offer reduced tariffs and enhanced market access, presenting considerable opportunities for Vietnamese agricultural exports. However, despite these advantages, Vietnam's trade defense mechanisms remain underdeveloped. The country currently lacks a robust and responsive system to anticipate and counteract anti-dumping, countervailing, and safeguard measures imposed by trading partners, particularly the United States ^[11,15].

The absence of an effective early warning system limits the ability of exporters and policymakers to prepare timely responses to trade disputes, often resulting in reactive rather than proactive measures. This deficiency can lead to sudden disruptions in export activities, financial losses, and a reduction in competitiveness in foreign markets. Strengthening trade defense capabilities, improving inter-agency coordination, and establishing comprehensive monitoring systems are critical for safeguarding Vietnam's agricultural export interests and ensuring sustainable growth in an in-

creasingly complex global trade environment.

In the context of growing U.S. tariff measures, Vietnam's response capacity remains limited. Exporters often struggle to access comprehensive and timely information regarding changes in U.S. tariff regulations, rules of origin, and technical standards. This information gap hampers their ability to anticipate and adapt to new requirements effectively, leading to compliance challenges that can result in financial penalties, shipment delays, or even rejection at U.S. customs ^[11,12]. The complexity of the U.S. trade regulatory environment, combined with frequent updates and stringent enforcement, further complicates exporters' efforts to maintain smooth market access.

Many key Vietnamese agricultural products, such as pangasius (catfish), shrimp, and pepper, are heavily reliant on the U.S. market. However, exporters often lack diversified export destinations and have limited contingency plans to mitigate the risks posed by the sudden imposition of trade remedies, such as anti-dumping or countervailing duties ^[14]. This overdependence on a single market exposes exporters to significant vulnerabilities, as tariff hikes or non-tariff barriers can abruptly disrupt trade flows and cause substantial financial losses.

Moreover, small-scale producers, who form a substantial portion of Vietnam's agricultural export sector, face considerable challenges in meeting the increasingly rigorous technical, environmental, and labor standards demanded by U.S. buyers. Many of these producers operate with limited resources, outdated technology, and a lack of knowledge of international compliance requirements. Support mechanisms for technological upgrading and the adoption of sustainable production practices remain insufficient and unevenly distributed, especially in rural and remote areas. This lack of support restricts producers' capacity to scale up and comply with certifications that are increasingly mandatory in international markets ^[13].

Consequently, compliance rates with internationally recognized certifications, such as Global GAP (Good Agricultural Practices) and HACCP (Hazard Analysis and Critical Control Points), as well as social responsibility standards, continue to be low among Vietnamese agricultural exporters ^[15]. These certifications are often prerequisites for entering and maintaining access to

high-value markets, such as the U.S. Failure to achieve these certifications not only limits market access but also affects the competitiveness and reputation of Vietnamese products abroad.

To enhance resilience and competitiveness, Vietnam has a pressing need to strengthen its information dissemination channels, improve capacity-building programs for exporters and producers, and invest in technological innovation and sustainable agricultural practices. Enhanced coordination among government agencies, industry associations, and international partners can facilitate better compliance management and support the development of diversified markets, thereby reducing dependence on any single export destination.

Another critical limitation lies in the lack of policy coordination between central and local governments. Although national-level strategies and frameworks have been developed and issued to promote agricultural exports, the practical implementation at the local level often faces significant challenges. Local authorities often lack the necessary capacity, expertise, and resources to effectively perform administrative support functions crucial for exporters, including customs clearance facilitation, certification processing, and logistics management—this gap in coordination results in inconsistent application of policies and uneven service quality across different regions.

Specifically, customs clearance procedures can be slow and cumbersome due to inadequate infrastructure, limited digitalization, and varying interpretations of regulations at local customs offices. This not only causes delays but also increases the risk of additional inspections or fines, thereby raising the cost and uncertainty for exporters. Similarly, certification processes for meeting international standards, such as sanitary and phytosanitary (SPS) requirements, often face bottlenecks at the local level due to a lack of trained personnel and coordination among inspection agencies. Furthermore, logistical challenges such as poor transportation infrastructure and inefficient supply chain management in some regions further hinder the timely delivery and preservation of agricultural products destined for export.

The fragmentation and lack of synergy between central policy design and local execution undermine

Vietnam's overall export competitiveness. Exporters, especially small and medium-sized enterprises (SMEs), bear the brunt of these inefficiencies as they rely heavily on local administrative support but often receive inconsistent or inadequate assistance. This is particularly problematic in the context of increasingly complex and protectionist U.S. tariff regimes, where exporters need streamlined, reliable, and transparent administrative procedures to quickly respond to changing market conditions^[14].

To overcome these challenges, it is essential to enhance capacity-building programs for local authorities, promote better inter-agency communication, and invest in modernizing infrastructure and digital systems. Establishing more straightforward guidelines and performance monitoring mechanisms can also help ensure uniformity in policy enforcement across regions. By strengthening coordination between central and local governments, Vietnam can enhance the effectiveness of its export promotion efforts and better support its agricultural exporters in navigating the complexities of international trade.

4.4. To Analyze the Impact of U.S. Reciprocal Tariffs on Vietnam's Agricultural Export Performance

The United States has increasingly utilized reciprocal tariff policies as a strategic trade protection tool to recalibrate bilateral trade relations with major partners, including Vietnam^[11,12,16]. These policies have had substantial impacts on various facets of Vietnam's agricultural export sector, notably affecting export value, commodity composition, and market orientation^[14,17].

4.4.1. Export Volume

The imposition of elevated tariffs on specific agricultural products originating from countries lacking bilateral Free Trade Agreements (FTAs), or those accused of engaging in unfair trade practices such as dumping or excessive subsidies, has indirectly constrained Vietnam's export performance^[11,15,18]. According to USDA estimates, in 2024, the total value of Vietnam's agricultural exports to the U.S. is projected to decline by approximately 11.4% compared to 2023, decreasing from USD 11.4 billion to USD 10.1 billion^[12,19]. This downturn is primarily attributable to challenges encountered by key export commodities, including cashew nuts, seafood, and tropical fruits, in complying with stringent new technical regulations, as well as the enforcement of anti-dumping duties and more rigorous origin traceability requirements imposed by U.S. authorities^[13,20].

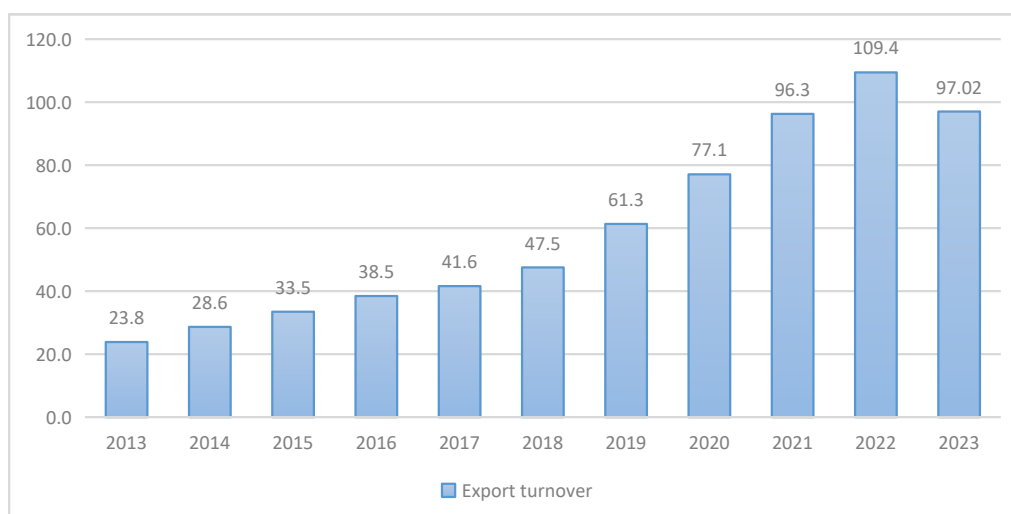


Figure 3. Vietnam's export turnover to the United States, 2013- 2023 (Unit: Million USD).

Source: General Department of Vietnam Customs.

According to statistics from the General Department of Vietnam Customs, the total bilateral trade turn-

over between Vietnam and the United States in 2023 reached USD 110.84 billion, representing a 10.54%

decrease compared to 2022. Of this figure, Vietnam's export turnover to the U.S. totaled USD 97.02 billion, a 11.35% decrease, while imports from the U.S. reached USD 13.82 billion, representing a 4.47% year-on-year decline (**Figure 3**).

Overall, Vietnam's exports to the United States experienced a notable decline in 2023 compared to the previous year. This downturn was primarily attributed to a significant drop in consumer demand in the U.S. market, driven by global economic uncertainties and rising inflation during the first half of the year. American consumers have increasingly reduced spending on non-essential goods. However, by the end of 2023, the U.S. economy had begun to show signs of recovery, growing at a pace that exceeded expectations. According to Trading Economics, U.S. GDP growth in the fourth quarter of 2023 reached 3.3%, significantly higher than the earlier forecast of 2%. Additionally, the U.S. core inflation rate in January 2024 fell to 3.9%, the lowest level in more than two years, remaining unchanged from December 2023, but still above the market forecast of 3.7% (**Figure 3**).

4.4.2. Product Structure

The impact of these reciprocal tariff policies has led to a notable transformation in the structure of Vietnam's agricultural exports. Enterprises have strategically adjusted their product portfolios to navigate the complex tariff landscape imposed by the U.S. By shifting away from goods facing high tariff barriers or stringent trade defense measures, exporters are increasingly focusing on commodities with preferential treatment under existing Free Trade Agreements (FTAs) such as CPTPP and EVFTA ^[21-23]. This strategic pivot aims to maximize tariff advantages and maintain competitiveness in the U.S. market.

For instance, the export share of fruits like passion fruit, pomelo, and dragon fruit has grown moderately, reflecting improved compliance with Sanitary and Phytosanitary (SPS) measures and enhanced market access due to stricter adherence to U.S. import standards ^[8,12,14]. These fruits benefit from lower tariffs and fewer non-tariff barriers compared to heavily scrutinized products. On the other hand, products such as

frozen shrimp and pangasius have faced a steep decline in export volume, largely attributable to anti-dumping duties and countervailing measures imposed by the U.S. trade authorities, which have raised costs and reduced demand ^[9,11,15].

Additionally, there is a clear shift toward higher-value-added products, with Vietnamese exporters emphasizing improvements in processing and packaging. This move away from exporting raw materials toward processed agricultural goods is a deliberate effort to mitigate tariff exposure and meet consumer demand for quality and safety, aligning with the requirements of the U.S. market ^[13,19,24]. Such diversification not only enhances the resilience of Vietnam's export sector but also supports sustainable growth by fostering innovation and upgrading in the agricultural value chain ^[20,25].

In response, many firms have restructured their supply chains and focused on building and improving product traceability systems to ensure transparency and compliance with the U.S. market's stringent food safety and technical standards ^[12,14]. Additionally, investment in processing and preservation technologies has been emphasized to enhance product quality, extend shelf life, and reduce post-harvest losses ^[19,25,26]. These improvements not only increase competitiveness but also strengthen firms' resilience against trade defense measures and market fluctuations.

Moreover, enterprises are gradually adopting digital solutions in supply chain and export management, such as export-import management software, automated quality control systems, and e-commerce platforms to reach end consumers more quickly and efficiently ^[21,24,27]. Leveraging modern technology helps minimize transportation risks, optimize logistics costs, and enhance business performance in an increasingly complex and volatile global market environment.

Nevertheless, this transition still faces many challenges, especially for small and medium-sized enterprises (SMEs), which often have limited financial resources, skilled labor, and technological capabilities ^[13,20]. The Vietnamese government and related agencies are enhancing support through training programs, preferential loans, and international cooperation initiatives to help businesses improve competitiveness and adaptability in the new international trade environment ^[24,28].

Investment in research and development for the creation and cultivation of plant and animal varieties that comply with the increasingly stringent quality, safety, and environmental standards of the U.S. market is also imperative. By enhancing genetic resources and production technologies, Vietnam can raise product standards to meet or exceed international benchmarks such as Global GAP and HACCP certifications, which are essential for accessing and sustaining export markets under complex trade regulations^[12,15,29].

Failure to implement these necessary policy adjustments and investment strategies risks eroding Vietnam's competitive advantage in several key agricultural sectors, such as seafood, fruits, and nuts, which are vital for rural livelihoods. A decline in export performance could lead to reduced incomes for rural households, undermining poverty alleviation efforts and threatening the broader national objective of sustainable agricultural development. Therefore, a holistic approach that integrates trade policy reform, technological innovation, and capacity building at all levels of the supply chain is essential to safeguard Vietnam's position in the global agricultural market^[30].

4.4.3. Market Dynamics

However, despite these positive trends, challenges remain. Compliance with stringent technical regulations, including traceability and environmental standards, continues to require significant investments, which can be particularly burdensome for small and medium-sized enterprises (SMEs)^[12,13,31]. The ongoing trade tensions and tariff uncertainties also compel exporters to develop more agile market strategies and diversify export destinations to reduce over-dependence on the U.S. market^[14,21,32].

The instability and unpredictability of the U.S. market, caused by reciprocal tariffs, have compelled Vietnamese exporters to diversify their export destinations in order to mitigate risks and stabilize their revenue. Many enterprises have proactively shifted their exports to preferential Free Trade Agreement (FTA) markets, such as the European Union through the EVFTA, Japan via the VJEPA, and South Korea under the VKFTA^[10,13,24]. These markets not only offer expansion opportunities

but also help businesses access new distribution channels, reducing dependence on the U.S. market, which is heavily affected by protectionist trade policies.

Despite diversification efforts, the U.S. still accounts for approximately 23-25% of Vietnam's total agricultural export turnover, underscoring its irreplaceable strategic importance to Vietnam's agricultural sector^[10,16]. This forces Vietnamese companies to continuously adapt to policy changes from the U.S., especially as tariffs and technical barriers increase.

In the long term, the United States' implementation of reciprocal tariff policies has underscored the urgent necessity for Vietnam to enhance its trade negotiation capabilities and adopt a more proactive and strategic stance in trade defense mechanisms. Developing a comprehensive framework that includes early warning systems and timely, coordinated response strategies is crucial for effectively managing and mitigating the impact of adverse tariff actions imposed by major trade partners. Such mechanisms would enable Vietnam to anticipate tariff threats, prepare adequate defenses, and minimize economic disruptions to its agricultural export sector^[24,25].

Moreover, the competitive pressure exerted by countries with established bilateral Free Trade Agreements (FTAs) with the U.S., including Mexico, Canada, and Australia, further highlights the importance of domestic reforms in Vietnam. To maintain and improve its market share (**Figure 2**), Vietnam must accelerate reforms in its domestic tax policies to foster a more business-friendly environment that encourages innovation and investment in high-quality agricultural production^[10,17].

4.5. Policy recommendations for Vietnam

Based on the above results and discussions, policy recommendations for improving Vietnam's agricultural export strategies in order to enhance adaptability, competitiveness, and sustainable access to the U.S. market amid increasing trade uncertainties are proposed as follows:

Amid increasing instability in the global trade environment, particularly driven by the United States' reciprocal tariff policies, Vietnam must strengthen its

institutional framework and trade policies to enhance adaptability and competitiveness in agricultural exports^[11,12,24]. Trade regulations and export management mechanisms require thorough review and adjustment to align with Vietnam's international commitments while maintaining flexibility to respond effectively to U.S. trade defense measures^[8,24,33]. The establishment of an early warning system and a comprehensive market information database is essential to support risk management for both policymakers and enterprises^[12,24].

Vietnam must also improve its bilateral negotiation capacity and strengthen legal instruments to combat unfair trade practices. Active participation in trade negotiation forums, sustained dialogue with the U.S. to clarify tariff policies, and developing a robust legal framework to assist enterprises in anti-dumping, anti-subsidy, and origin fraud cases are essential measures^[11,12,24]. Vietnam needs to review, develop, amend, and supplement its system of agricultural export policy documents to ensure a comprehensive, consistent, clear, and transparent legal and policy framework, by international regulations and commitments.

Improving Vietnam's agricultural export policies in response to the U.S.'s reciprocal tariff measures is not merely a defensive action but a strategic transformation. This requires coordinated efforts spanning policy reform, technological innovation, market expansion, and sustainability initiatives, involving the government, enterprises, and farming communities alike. Only through such a comprehensive and forward-looking approach can Vietnam consolidate and strengthen its position within the global agricultural value chain^[14,21].

Sustainable agricultural development should be integrated into long-term export strategies. Policies promoting organic, circular, and climate-resilient agriculture are vital to enhancing Vietnam's international credibility and ensuring sustainability^[14,24]. Investment in standardized raw material zones, high-tech agricultural zones, and farmer support programs to improve production practices aligned with international quality standards is imperative^[15,19].

Product diversification and value chain restructuring are essential strategies for sustaining export growth. Transitioning from raw commodity exports to deeply processed agricultural products not only

increases added value but also mitigates exposure to high tariffs^[14,19]. Strong branding efforts, particularly for region-specific agricultural products with traceable origins, play a vital role in enhancing market competitiveness^[21]. Public-private partnership (PPP) models should be encouraged to fortify linkages between production, processing, and distribution stages^[24].

Enhancing the capacity of export enterprises to comply with technical standards and overcome non-tariff barriers is critical. Priority investment should be given to post-harvest processing technologies, preservation systems, and traceability infrastructure, enabling Vietnamese products to meet stringent U.S. sanitary and phytosanitary (SPS) standards as well as technical barriers to trade (TBT) requirements^[11,15,19]. Concurrently, a national certification system must be developed alongside expanded training programs for enterprises and government officials on U.S. regulatory and procedural compliance^[13,24].

5. Conclusion

In the context of increasingly complex international trade characterized by rising protectionism, the United States' reciprocal tariff policy has become a crucial tool for adjusting trade balances and protecting domestic interests^[6,7]. This policy primarily targets imported goods from countries without bilateral free trade agreements with the U.S. or those accused of engaging in unfair trade practices, imposing higher tariffs to create leverage in trade negotiations and safeguard domestic industries^[8,9]. The escalation of the U.S.-China trade war has had significant ripple effects on global trade networks, disrupting supply chains and compelling affected countries, including Vietnam, to recalibrate export strategies to cope with heightened risks and uncertainties^[11,12].

Vietnam's agricultural export sector, a key pillar of its economy, has encountered multifaceted challenges due to these reciprocal tariffs. Despite Vietnam's active participation in FTAs and its implementation of trade promotion policies and tax incentives designed to expand market access^[10,17,18], structural obstacles persist. Among these are the lack of an effective early warning system to anticipate and respond swiftly to trade risks,

limited capacities among exporters, especially SMEs, to meet increasingly stringent U.S. technical and sanitary standards, and insufficient coordination between central government bodies and local authorities responsible for export management^[19,24].

Empirical data and recent reports have shown a decline in Vietnam's agricultural export volumes to the U.S., alongside a notable shift in export product composition, as enterprises seek to avoid high tariff categories and pivot toward products with preferential tariff treatments or alternative markets^[14,15,20]. Vietnam remains a strategically important supplier to the U.S. market, accounting for a significant portion of agricultural exports, which underscores the need for sustainable policy measures to maintain momentum and competitiveness^[16,21].

To address these challenges, this study suggests a multi-pronged policy approach. Firstly, strengthening Vietnam's trade defense capacity is imperative, including the establishment of a comprehensive early warning system that integrates market intelligence and risk assessment to inform timely policy and enterprise responses^[13,16]. Improving exporters' compliance with technical standards, including sanitary and phytosanitary measures (SPS) and traceability requirements, should be prioritized through targeted investments in infrastructure, technology, and capacity-building programs^[19,25].

Institutional coordination between ministries, agencies, and local authorities must be enhanced to streamline export processes and ensure coherent responses to trade defense actions^[11,24]. Encouraging public-private partnerships will bolster linkages between producers, processors, and exporters, facilitating value chain restructuring toward higher value-added and less tariff-sensitive products^[12,14]. Additionally, increasing investment in post-harvest processing and preservation technologies can improve product quality and shelf life, thereby enhancing market competitiveness^[15,19].

Diversification of export markets remains a critical strategy to mitigate risks associated with U.S. tariffs, with Vietnam intensifying efforts to penetrate preferential markets under FTAs, such as the EU, Japan, and Korea, thereby reducing its overdependence on a single

market^[10,23]. Meanwhile, continuous diplomatic engagement with the U.S. aims to clarify tariff measures, address trade disputes, and seek mutual understanding to sustain agricultural trade flows^[13,22].

In conclusion, Vietnam's response to the U.S.'s reciprocal tariff policy requires a strategic, comprehensive approach that balances trade defense, technical compliance, institutional reform, and market diversification. By doing so, Vietnam can strengthen its adaptability, sustain export growth, and secure its position in global agricultural value chains, despite ongoing global trade uncertainties^[6,25].

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Informed Consent Statement

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Data Availability Statement

Data supporting the findings of this study are available at <https://vioit.moit.gov.vn/>

Conflicts of Interest

The authors declare no conflict of interest.

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