The DR/Central American Free Trade Agreement:

What's at Stake for U.S. Agriculture?

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Outline

- Overview of Policy Environment & Why Regional Agreements

- Specifics of DR/CAFTA

- The Problem with Sugar

- Implications for U.S. Agriculture

Overview of U.S. Regional Trade Agreements & Initiatives

- Agricultural Trade Benefits Many U.S. Producers
- Success is dependent on high quality, competitive prices and good delivery systems
- But terms of trade are heavily influenced by Policy
- Goals and Directions of Policymakers

defined in Post 9-11 World somewhat Changed

US Trade Strategy

- Multilateral Trade Negotiations
  - World Trade Organization
- Regional Trade Agreements
  - Central American Free Trade Agreement
- Bilateral Trade Agreements
  - US-Australia Trade Agreement

Why Regional Agreements?

- 2d Best Solution After MTN
  - Slow Progress in WTO, (2007?)
- Economic Incentives
  - Open Markets
  - Create Economies of Scale
  - Increase Business Efficiency

Strategic Considerations

- **Stem Illegal Immigration**
- **Secure Strategic Materials**
  - Oil/Natural Gas
  - Fertilizer
- **Create Buffer Against Terrorism**
  - ‘Seam State’ Argument, Thomas Barnett, U.S. Naval War College (New Rule Sets Project2000)

http://www.nwc.navy.mil/newrulesets/

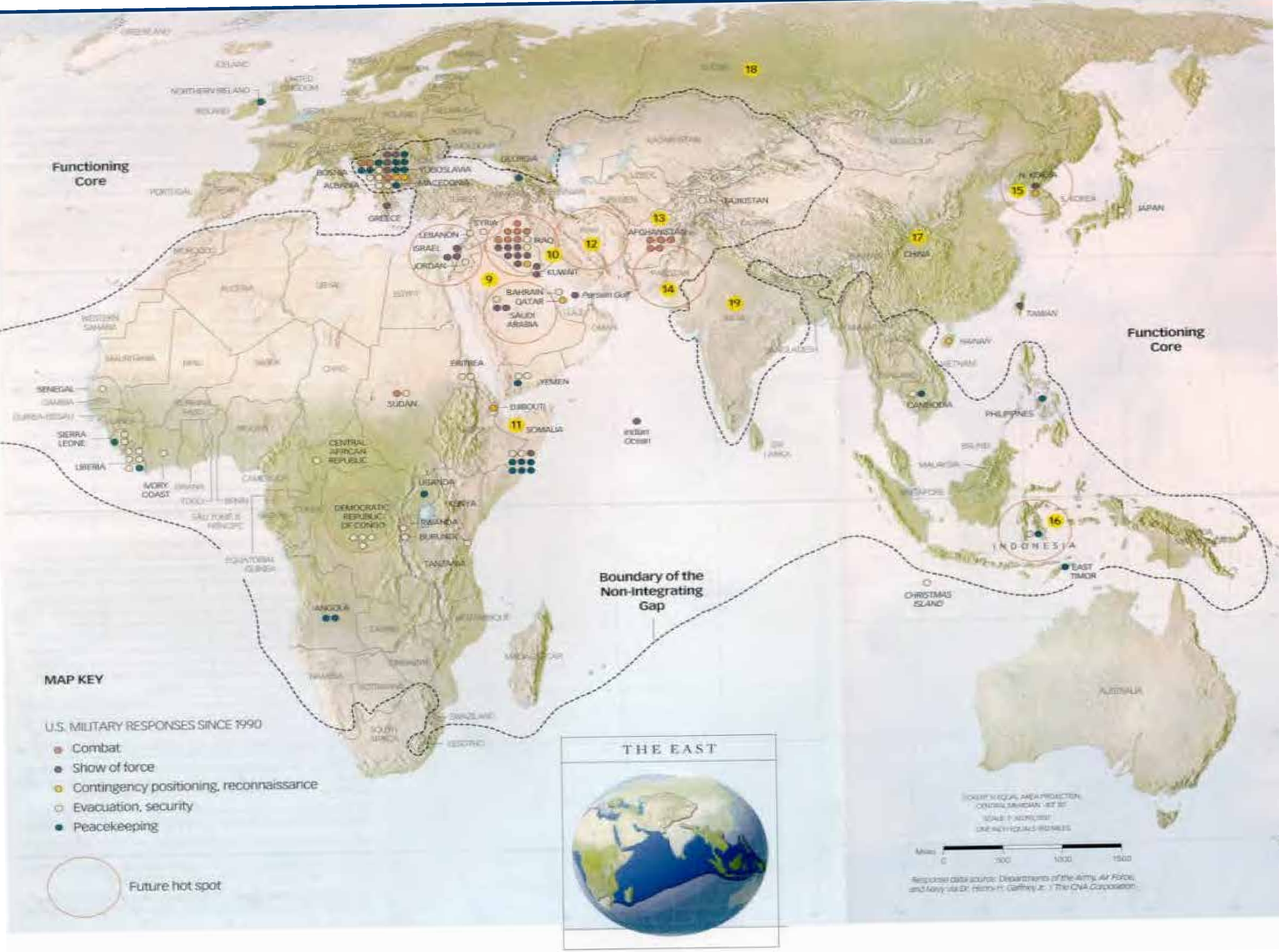
Strategic Considerations

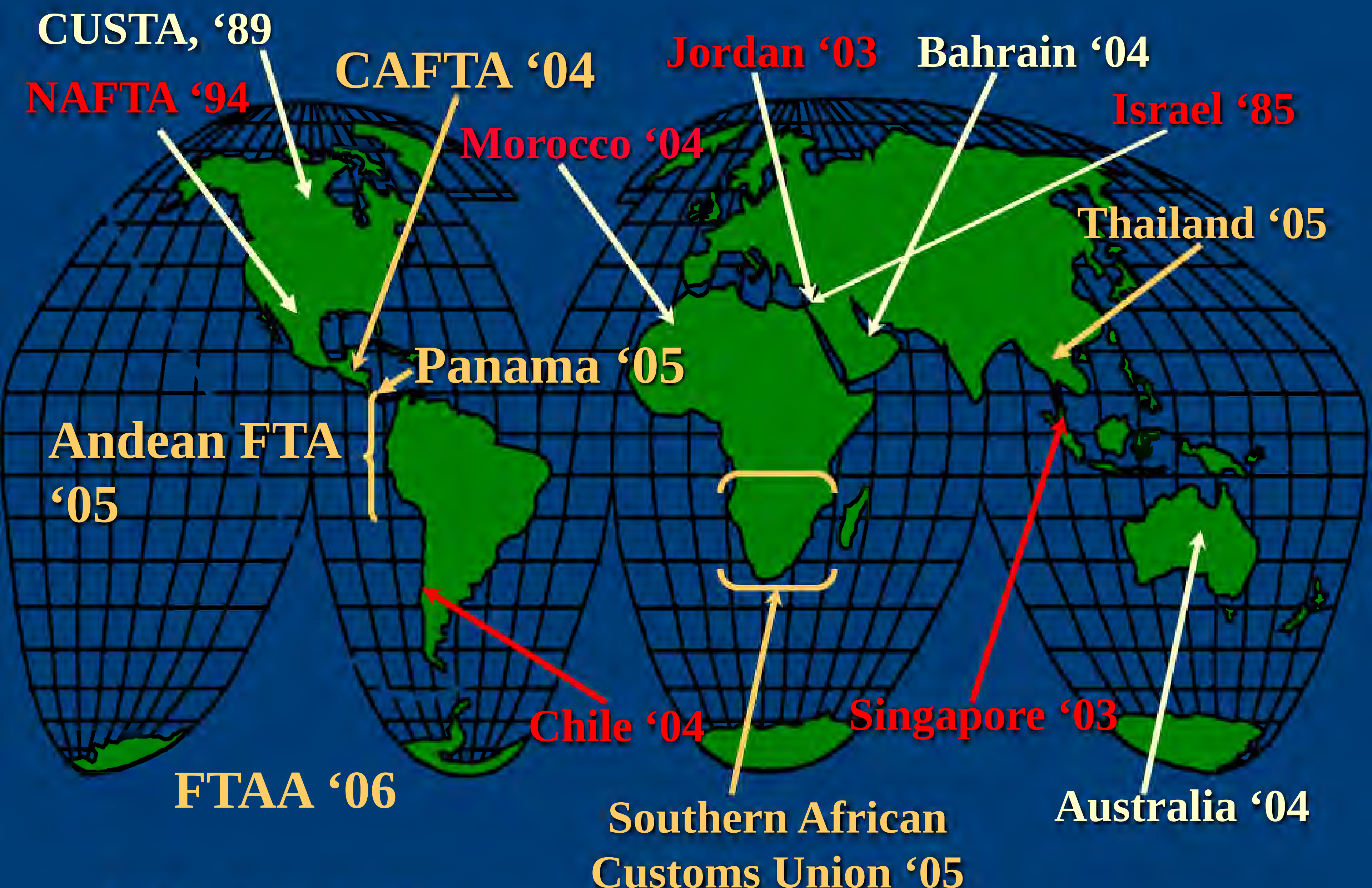
Closing the Gap Between Functioning Core & ***Nonintegrating Gap*** Nations

MAPPING AMERICA'S WAR ON TERRORISM: AN AGGRESSIVE NEW STRATEGY

The maps on these pages show all United States military responses to global crises from 1990 to 2002. Notice that a pattern emerges. Any time American troops show up—be it combat, a battle group pulling up off the coast as a reminder, or a peacekeeping mission—it tends to be in a place that is relatively disconnected from the world, where globalization hasn't taken root because of a repressive regime, abject poverty, or the lack of a robust legal system. It's these places that incubate global terrorism. Draw a line around these military engagements and you've got what I call the Non-Integrating Gap. Everything else is the Functioning Core. The goal of this new strategy is simple: *Shrink the Gap. Don't contain it, shrink it.*

—THOMAS P. M. BARNETT


Functioning Core
Functioning Core
Boundary of the Non-Integrating Gap
NORTHERN IRELAND
BOSNIA
ALBANIA
YUGOSLAVIA
MACEDONIA
GREECE
GEORGIA
SYRIA
LEBANON
ISRAEL
JORDAN
IRAQ
KUWAIT
BAHRAIN
QATAR
SAUDI ARABIA
Persian Gulf
AFGHANISTAN
TAJIKISTAN
N. KOREA
S. KOREA
JAPAN
CHINA
TAIWAN
HAINAN
CAMBODIA
PHILIPPINES
INDONESIA
EAST TIMOR
CHRISTMAS ISLAND
ERITREA
YEMEN
DJIBOUTI
SOMALIA
SUDAN
Indian Ocean
SENEGAL
SIERRA LEONE
LIBERIA
IVORY COAST
CENTRAL AFRICAN REPUBLIC
DEMOCRATIC REPUBLIC OF CONGO
UGANDA
KENYA
RWANDA
BURUNDI
ANGOLA
9
10
11
12
13
14
15
16
17
18
19
MAP KEY
U.S. MILITARY RESPONSES SINCE 1990
Combat
Show of force
Contingency positioning, reconnaissance
Evacuation, security
Peacekeeping
Future hot spot
THE EAST



U.S. Trade Agreements

Table 1. Current regional and bilateral free trade agreements involving the United States.

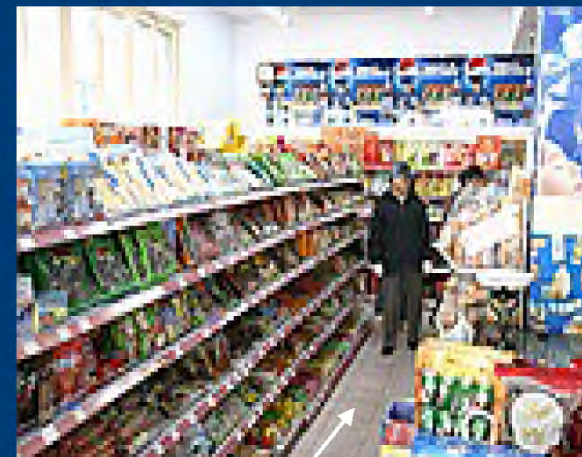
Country/agreement	Date/status
Israel	1985 (agricultural agreement 1996–2001)
Canada	1986 (grandfathered into NAFTA)
NAFTA (Mexico & Canada)	1994
Jordan	2001
Singapore	2004
Chile	2004
Australia	2005
CAFTA (Costa Rica, Honduras, Nicaragua, El Salvador, Guatemala)	Negotiations concluded January 2004; awaiting submission of implementing legislation to US Congress
Dominican Republic (added to CAFTA)	Negotiations concluded March 2004; awaiting submission of implementing legislation to US Congress
Panama (to be added to CAFTA)	Negotiations began April 2004
Morocco	Negotiations concluded in March 2004; implementation legislation passed US Congress; awaiting ratification by Moroccan Parliament
Bahrain	Negotiations concluded in May 2004; awaiting submission of implementing legislation to US Congress
SACU (South African Customs Union: Botswana, Namibia, Lesotho, Swaziland, South Africa)	Negotiations began in June 2003
Thailand	Negotiations began in June 2004
Colombia, Ecuador and Peru	Negotiations began in May 2004
Bolivia	Expected to join Colombia, Ecuador, and Peru talks later
Oman	Notification to Congress of intent to negotiate, November 2004
United Arab Emirates	Notification to Congress of intent to negotiate, November 2004

Note. Data from Office of the United States Trade Representative (2005) and public statements.

But: These Folks are Here to Stay
As Competitors and Consumers
And in Some Cases Partners And Collaborators

French Winemaker
In New Winery JV
In China

Chilean Fruit Exporter



China

Foreign Markets / US Products

Nicaragua

Global Berry Partner

Future Customers

CAFTA / DR

U.S. merchandise trade with the CA/DR region, 2000–03

(US$ million)

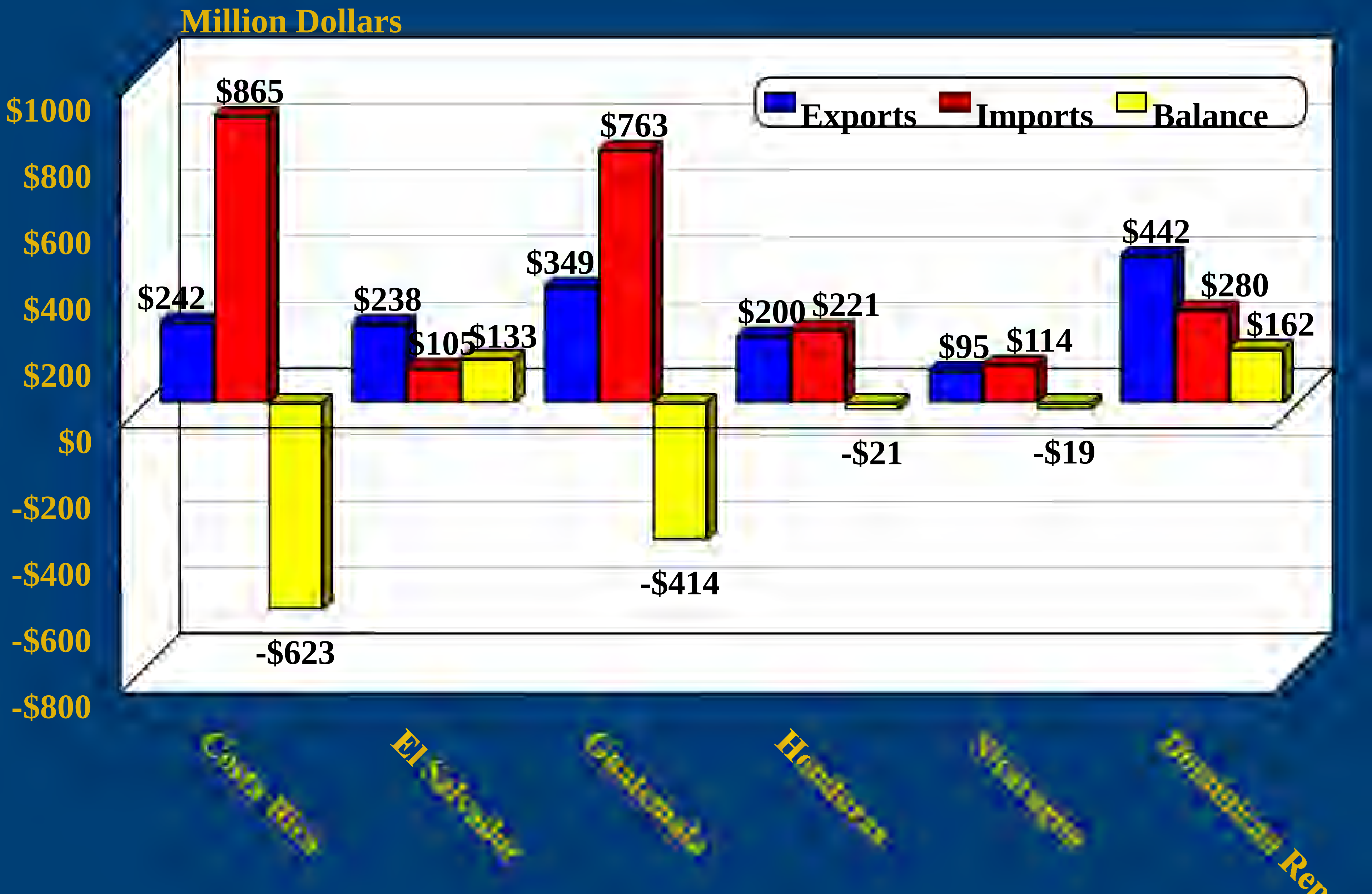
	2000	2001	2002	2003
U.S. exports	13,202	13,025	13,532	14,372
U.S. imports	16,150	15,304	16,013	16,862
Trade balance	-2,948	-2,279	-2,481	-2,490
Total imports	16,150	15,304	16,013	16,862
Dutiable[1]	5,477	3,504	3,273	3,340
Duty free	10,673	11,800	12,740	13,522
NTR	8,596	4,830	4,634	4,924
CBERA	1,744	1,940	2,252	2,193
CBTPA	149	4,959	5,936	6,167
GSP	182	162	82	236
Duty-free imports as a percentage of total imports (percent) *	66.1	77.1	79.6	80.2

[1] Includes reduced-duty imports under CBERA and CBTPA.

Source: Compiled from official statistics of the U.S. Department of Commerce.

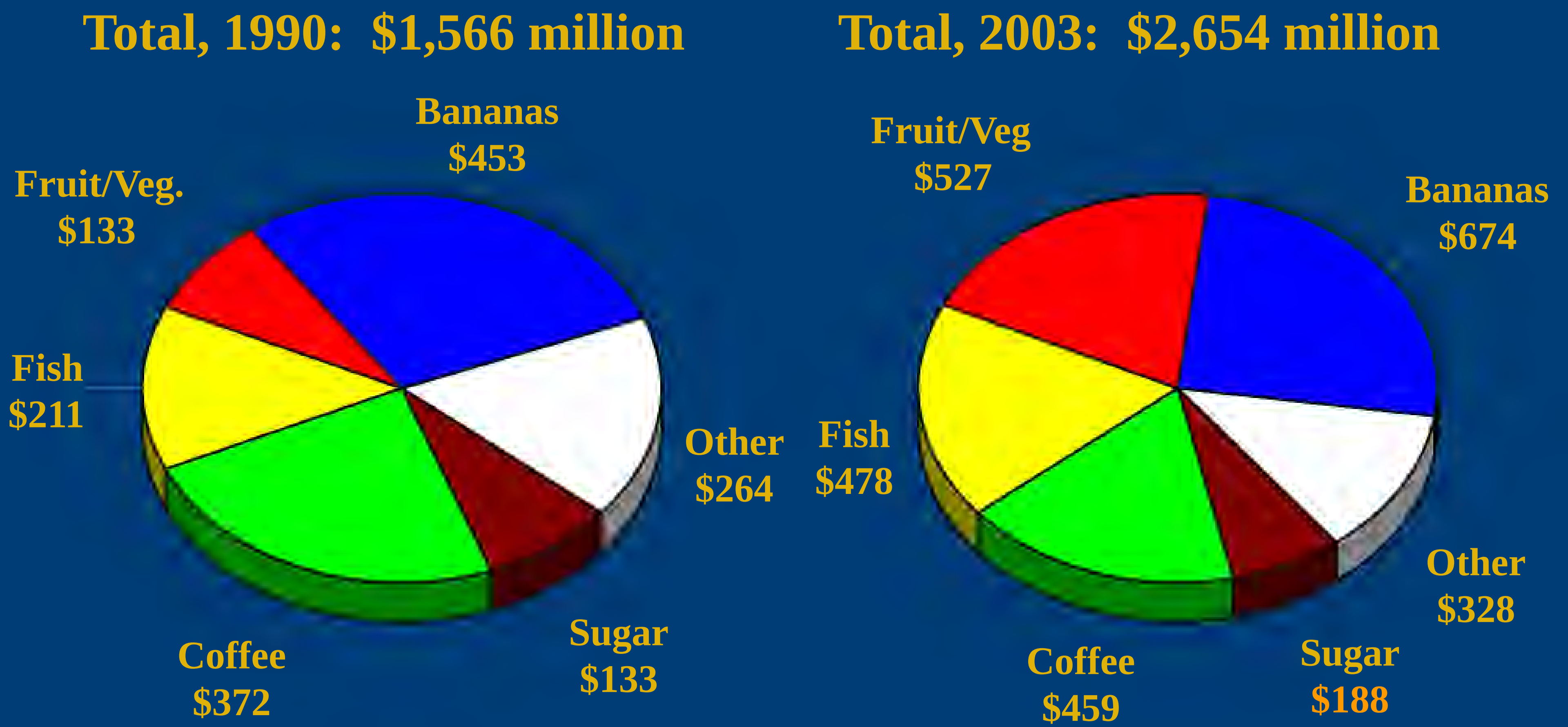
*Over 90%
For Ag Products

U.S. Ag Trade with DR-CAFTA, 2003



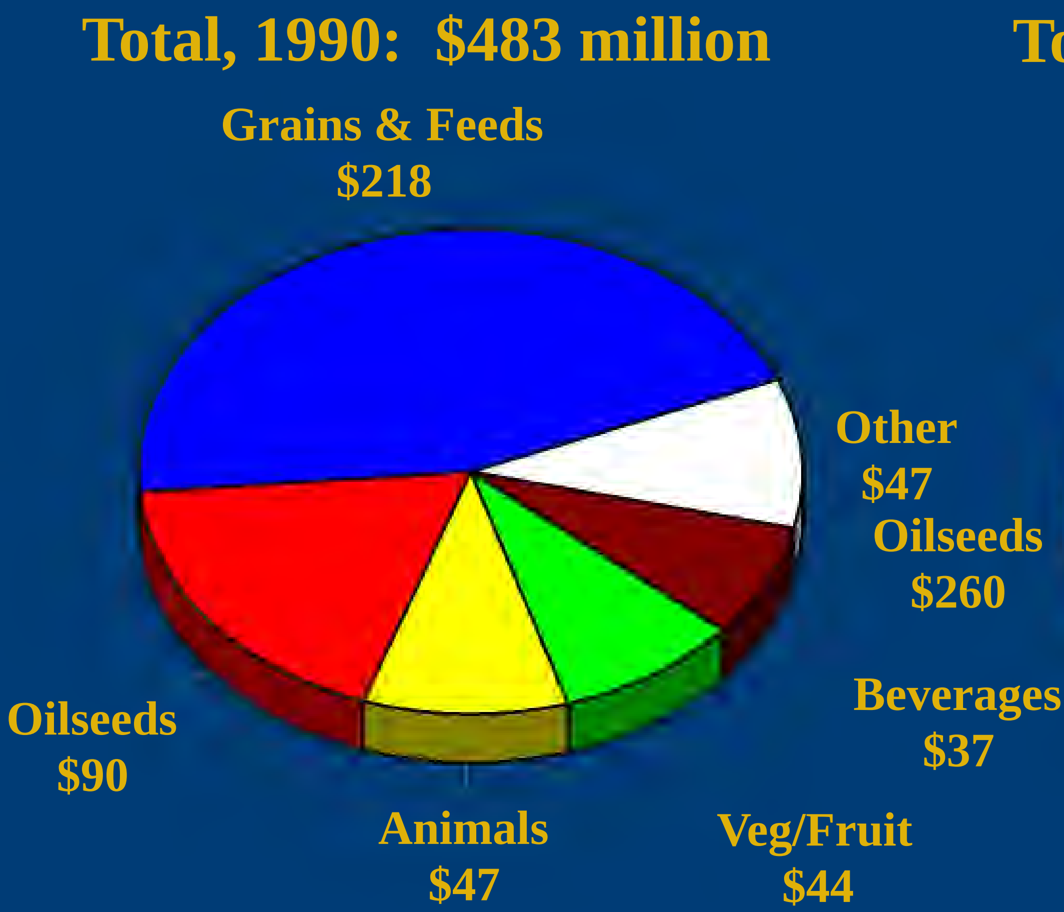
Source: Foreign Trade Statistics, U.S. Census Bureau

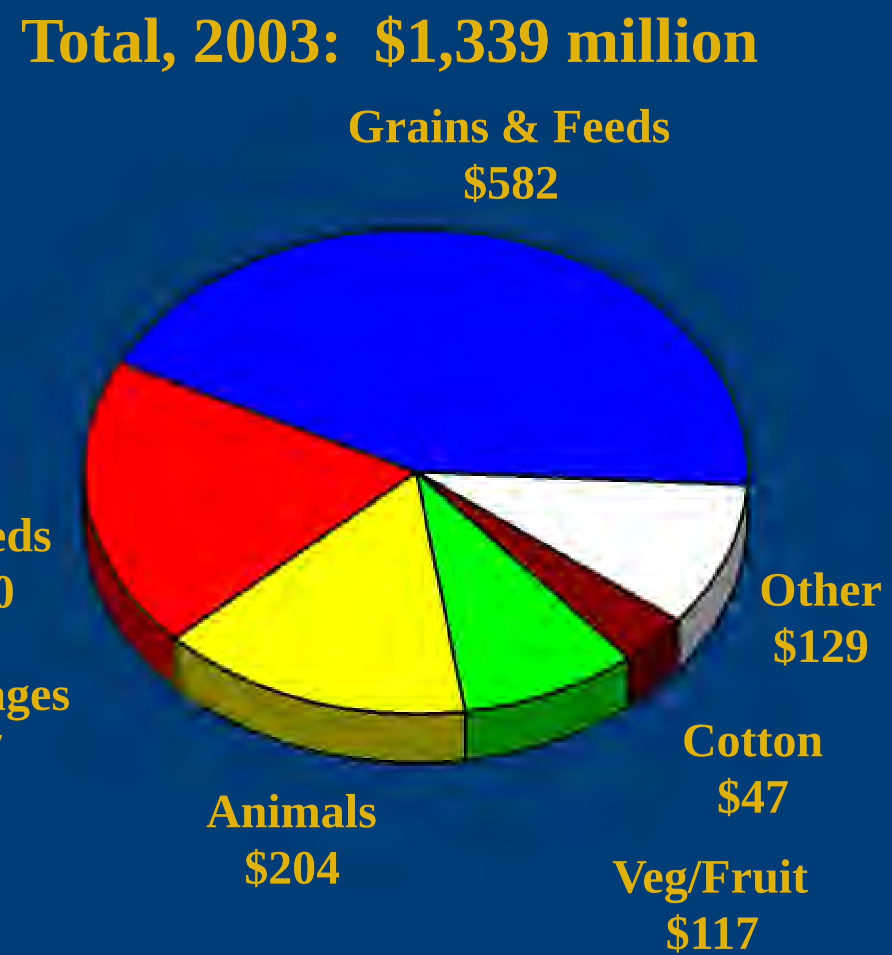
U.S. Agricultural Imports from Central American



Source: U.S. Trade Internet System, www.fas.usda.gov/ustrade

U.S. Agricultural Exports to Central America





Source: U.S. Trade Internet System, www.fas.usda.gov/ustrade

Basics of the Agreement

Tariff Elimination
General Approach: All products go to zero Linear cuts from applied rates Staging: Immediate, 5, 10, and 12/15 years Backloaded cuts for some sensitive products
Tariff-Rate Quotas
Limited to sensitive products Zero in-quota duty TRQs In addition to existing WTO quota commitments Country-specific TRQ's
Safeguards
Applies to limited number of products Volume-based Expires once duties are eliminated
Export Subsidies
No export subsidies on intra-CAFTA trade unless other countries use them
Domestic Support Programs
Pursue jointly in the WTO

Average Tariff Rates for Selected Commodities

Weighted Average of 6 DR-CAFTA Countries

Values in Percentage

Commodity	Applied[1]	Bound[2]
All Fruits	15.0	45.0
All Vegetables	15.0	45.0
Beef	16.2	101.0
Butter	9.7	88.1
Cheese	25.2	61.7
Corn	11.7	106.4
Cotton	15.0	40.5
Pork	21.8	54.5
Poultry	20.2	176.7
Rice	39.7	67.2
Soybean Meal	6.6	36.0
Soybean Oil	8.9	78.5
Wheat	0.7	107.7

Source: AFBF

Rice	
Central America Commitment:	U.S. Commitment:
Tariffs eliminated over 18 years (Costa Rica 20 years) Tariff cuts backloaded Safeguard Initial rough rice TRQ – 343,000 MT, growing 2-5% annually Initial milled rice TRQ – 39,750 MT, growing 5% annually	Current zero duty locked-in immediately
Corn	
Central America Commitment:	U.S. Commitment:
Yellow corn: duty phase-out over 15 years Initial TRQ of approximately 1 million MT Costa Rica – immediate duty-free *White corn:* Initial TRQ of 83,000 MT, growing 2% annually No out-of-quota duty phase-out Costa Rica – no TRQ, linear 15 year phase-out	Current zero duty locked-in immediately
Sugar	
Central America Commitment:	U.S. Commitment:
Duty phased-out over 15 years	Additional initial TRQ of 109,000 MT TRQ grows by 2% in perpetuity No out-of-quota duty reduction

<table>
<tr><th colspan="2">Dairy</th></tr>
<tr><td colspan="2">Reciprocal Arrangement</td></tr>
<tr><td colspan="2">Total initial TRQ of nearly 6,000 MT, growing at 5% annually
Tariff phase-out over 20 years
Tariff cuts backloaded
Safeguards</td></tr>
<tr><th colspan="2">Horticultural Products</th></tr>
<tr><td>Central American Commitment:</td><td>U.S. Commitment:</td></tr>
<tr><td>Immediate duty-free access for many U.S. priority products
Duties on most other products phased-out over 5-10 years
French fries:
CA-4: Immediate duty-free access for frozen french fries
Costa Rica: “Canada Parity”
Costa Rica:
TRQ for fresh onions and potatoes
No out-of-quota duty phase-out</td><td>Current zero duty is locked-in immediately</td></tr>
</table>

Selected Commodity Details	
Beef	
Central American Commitment:	U.S. Commitment:
Immediate duty-free access for "prime" and "choice" cuts Other cuts phased-out over 15 years Duties on other products, including offals, phased-out over 5-10 years	Total initial TRQ of 20,940 MT, growing 5% annually In addition to existing U.S. WTO quota Country-specific TRQ CAFTA TRQs open only after WTO quota fills
Pork	
Central American Commitment:	U.S. Commitment:
Tariff phase-out over 15 years Total initial TRQ of 9,450 MT, growing 5-15% annually Immediate duty-free access for bacon and some offal products	Current zero duty is locked-in immediately
Poultry	
Central American Commitment:	U.S. Commitment
CA-4: TRQ (leg quarters) established at greater of 21,810 MT or 5% of regional production Tariff phase-out 18 years Costa Rica: 300 MT TRQ (leg quarters), growing at 10% annually Tariff phase-out 17-years Other products phased-out more quickly, many within 10 years	Current zero duty is locked-in immediately

The Trouble with Sugar

(with apologies to Star Trek)

Special Report 03-3 December 2003
Impacts of the U.S.-Central America Free Trade Agreement on the U.S. Sugar Industry

Prepared for Senator Byron Dorgan
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"If the United States imports more than 500 thousand tons of additional sugar, a limited number of sugar producing regions in the United States would be able to remain viable. Wholesale price of sugar would be about 20 cents in the United States with an additional import of 500 thousand tons, and would decrease further as additional imports increase."

The current U.S. proposal on sugar under CAFTA could permit the Central American countries to export more than one million tons of sugar to the United States within a few years. Even if the second tier tariff is not included in the final agreement, incremental access, as requested by the CAFTA countries, could be in the range of 300,000 tons per year. In addition, with expected additional imports of sugar under various FTAs, such as NAFTA and FTAA, total additional U.S. imports of sugar could exceed one million tons, which would hurt the U.S. sugar industry significantly.

- If the United States imports more than 2 million tons of additional sugar from the CAFTA countries, the world price of sugar would increase from 8 cents/pound to 10 cents/pound and the U.S. domestic wholesale price would decrease to 13 cents/pound. At this price level, the United States would import more than 80% of its domestic consumption.

The Problems with Sugar?

Agribusiness & Applied Economics Report No. 561 April 2005
2005 Outlook of the U.S. and World Sugar Markets, 2004-2013
Won W. Koo & Richard D. Taylor

"The United States signed a trade agreement with the Central American countries of El Salvador, Guatemala, Honduras, Nicaragua, Costa Rica and the Dominican Republic. CAFTA allows 107,000 metric tons of additional sugar to be imported into the United States in the first year of implementation of the agreement, and increases by about 3,000 metric tons per year. The level allowed does not have a significant impact on the price of U.S. sugar or world trade flows. Recent trade agreement and negotiations with Australia do not include increased sugar imports."

Based on LSU work and NDSU average production 2000-2004 in US Of 7,755,000 metric tons. The US price decline resulting from increased Import volume at end of 15 years of around 150,000 metric tons would be 0.93 ¢ per pound or about $171 million decline in revenue for the sector. First year effects estimated at 0.63 ¢ per pound

The Problems with Sugar?

“DR-CAFTA is a case in point. The agreement allows the six member countries to boost their sales to the United States market by 107,000 tons. Put in context, domestic production of sugar for the 2003/2004 fiscal year was 7.8 million tons. Consequently, this agreement in isolation will not significantly affect the industry. The rise in access will be equivalent to $80.5 million per year, when fully implemented. This compares to total cash receipts for sugar producers in 2002 of $2.1 billion.” (About 3.8% after 15 years)

Source: AFBF

Table 2: Changes in Prices and Quantities Resulting from Alternative US Market Access Scenarios

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	U.S. [illegible]
[illegible]	¢/[illegible]	¢/[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	20.66	7.43	4,416	3,716	8,946
100	20.03	7.44	4,370	3,700	8,984
150	19.73	7.44	4,347	3,693	9,003
500	17.71	7.46	4,190	3,637	9,141
1,000	15.13	7.49	3,972	3,558	9,344
2,000	10.96	7.56	3,560	3,401	9,775
3,089	7.63	7.63	3,148	3,233	10,284

Source: Kennedy, 2005

The Problems with Sugar

CAFTA...

A bad deal for America's 146,000 sugar workers. A bad deal for America.

The trade pact with Central America will cost American sugar farmers their jobs.

• The U.S. government estimates that CAFTA will send more American sugar workers to the unemployment line than workers from any other industry, by far. *And these estimates don't even account for mounds of Mexican sugar that soon will have unlimited access to our market under NAFTA.*

• CAFTA + NAFTA = the shafta for U.S. sugar producers' jobs.

• CAFTA-plus NAFTA sugar, plus sugar imported from nearly three dozen other countries as agreed to under the WTO, plus stored U.S. sugar that would be released because of these trade deals-equals more than 1 million tons of surplus sugar. *That much sugar would depress prices to levels well below production costs, endangering the livelihoods of thousands of U.S. sugar farmers and factory workers.*

CAFTA will take millions from American sugar farmers.

• At a minimum, the unneeded sugar imported under CAFTA would drop sugar prices enough to cost America's sugar farmers more than $180 million, according to Louisiana State University estimates.

• Factor in the 1 million tons of stored U.S. sugar that could be released as a result of CAFTA, and sugar prices plummet nearly 40 percent, calculates North Dakota State University economists. *Such a drop could cost U.S. sugar producers as much as $1.7 billion.*

CAFTA sets a dangerous precedent.

• America is negotiating trade pacts with 21 other sugar exporters that will all expect similar, sweetheart deals. *These countries export nearly 25 million tons of sugar annually.*

A deal with Central America is no deal for the United States.

• CAFTA only gives America market-access to a group of countries whose combined GDP is barely the size of New Haven, Connecticut. *What's worse, the U.S. government has said that CAFTA will actually increase our trade deficit with the region to $2.4 billion.*

The choice is clear...

Support America's efficient sugar farmers. Say no to CAFTA - a deal that has little economic upside, puts U.S. farmers out of work, and forces America to import unneeded sugar from a region with appallingly low labor and environmental standards.

March 2005

Proposed Solutions to the Problems with Sugar

• June 28th Senate action based on keeping current import "trigger" at 1.532 million short tons until 2007, "pay" CAFTA suppliers not to send excess sugar and do a feasibility study on sugar for ethanol program

Two options : USDA would make sure that the extra sugar does not enter the U.S., or USDA would purchase that sugar and send it to non-food use, such as ethanol production.

Details :

USDA could pay exporting countries in either cash or export commodities -- the difference between the world market price and the U.S. price. For example, if the world sugar price is 8 cents and the U.S. price is 22 cents, we would pay the 14-cent difference to CAFTA countries for them to not send their sugar to the United States. The payment could come either in cash, or send them tons of U.S. agricultural commodities of their choosing. "

USDA could purchase the CAFTA sugar as it enters the United States and convert it to non-food use, mainly ethanol.

The Reported Option is to pay the DR-CAFTA countries in U.S. ag commodities.

Implications for U.S. Agriculture

CAFTA Before and After

CAFTA Effect on Central American Tariffs

Before	CAFTA Day 1
Average Applied Tariff	Average Applied Tariff*
– Simple 11.2%	– Simple 6.7%
– Trade weighted 10.4%	– Trade weighted 3.2%

* Based on current trade and including TRQ in-quota access

CAFTA Before and After

U.S. Agricultural Exports to Central America

Pre-CAFTA

Duty Free $382 million
Dutiable $672 million

CAFTA Year 1

Duty Free $833 million
Dutiable $221 million

Duty Free*
Dutiable

*Includes both immediate tariff elimination and duty-free in-quota access

Table 2

Impact of DR-CAFTA on Member Countries' Imports of U.S. Agricultural Products

In $1,000

Selected Commodity	1999-2001 Imports from United States	2024 Imports from US: **Without** DR-CAFTA	2024 Imports from US: **With** DR-CAFTA	DR-CAFTA Difference
Beef	10,050.4	27,258.2	74,332.7	47,074.5
Butter	709.6	1,793.7	3,091.5	1,297.8
Cheese	5,514.1	8,024.4	25,022.7	16,998.4
Corn	230,721.4	447,558.4	505,932.5	58,374.1
Cotton	50,558.4	87,729.8	115,331.9	27,602.1
Pork	11,008.1	95,438.1	203,388.9	107,950.8
Poultry	17,634.5	114,743.9	292,786.7	178,042.9
Rice	96,999.0	220,910.4	312,421.1	91,510.7
Soybean Meal	140,421.3	292,351.5	348,923.6	56,572.0
Soybean Oil	28,895.3	59,132.4	87,521.9	28,389.6
Wheat	121,821.0	218,977.3	281,164.2	62,186.9
Subtotal	714,333.2	1,573,918.0	2,249,917.8	675,999.8
Other Selected Commodities				
Fruit	88,768.7	196,738.8	278,281.1	81,542.3
Sugar & Tropical Product	111,754.7	247,682.9	350,340.0	102,657.1
Tallow	62,489.3	138,495.7	195,898.0	57,402.3
Vegetables	69,560.7	154,168.0	218,065.9	63,898.0
All Other Commodities	587,601.5	1,302,306.9	1,842,073.7	539,766.8
Total	1,634,508.1	3,613,310.3	5,134,576.5	1,521,266.2

Note: Assumes constant 1999-2001 prices; hence, value estimates reflect changes in quantities only.

Source: AFBF

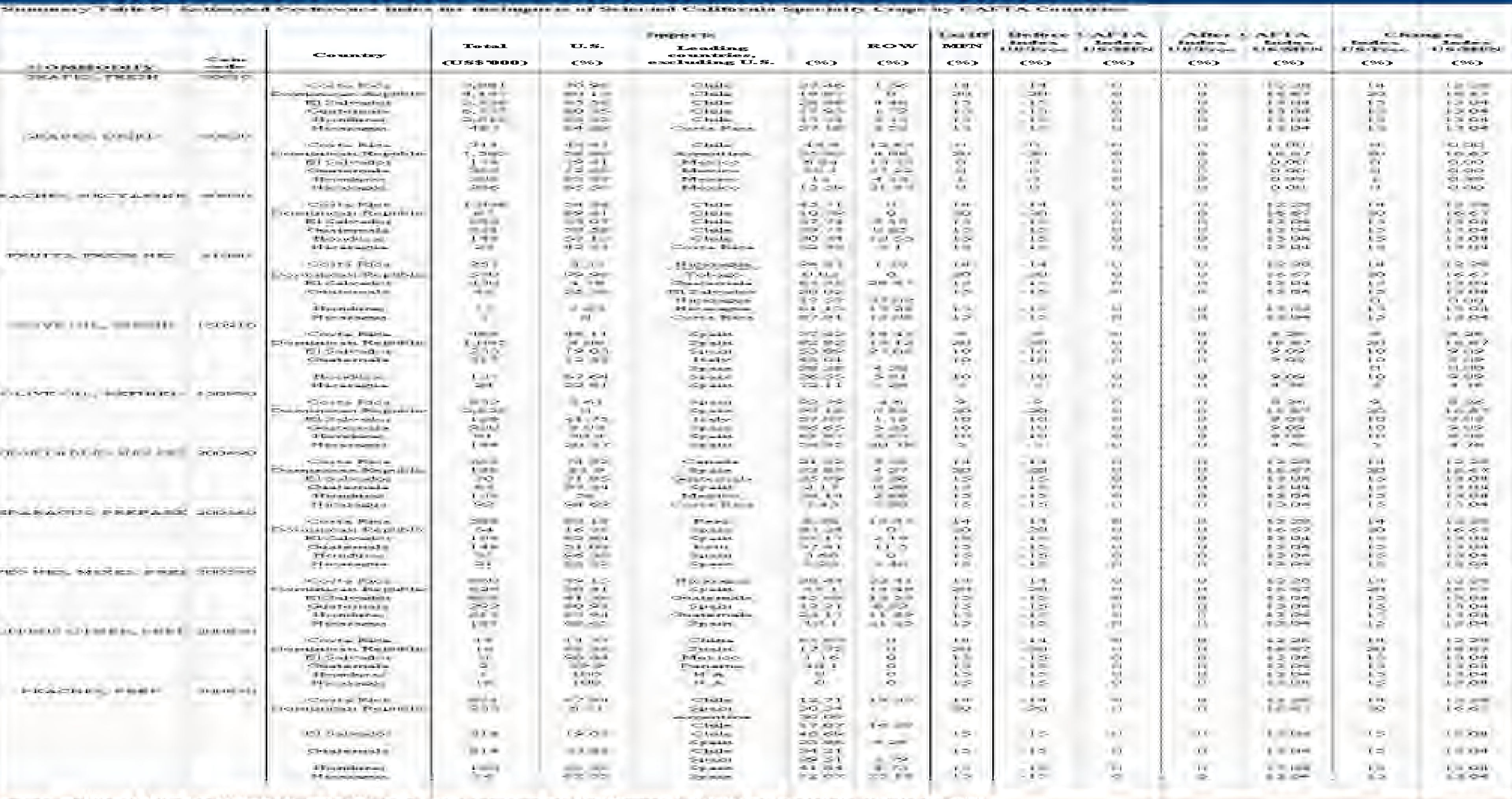
Table 4-4
U.S.-CA/DR FTA: U.S. imports from CA/DR and CA/DR imports from the United States (landed, duty paid)

Sector	U.S. imports			CA/DR imports from the United States		
	Base value before FTA	Change after FTA full implementation[1]		Base value before FTA	Change after FTA full implementation[1]	
	------million dollars------		percent	-----million dollars----		percent
Textile, apparel, and leather products	11,763.9	3,067.5	26.08	5,350.0	802.8	15.01
Sugar manufacturing	329.3	113.2	34.38	0.4	0.6	166.38
Meat products	79.4	13.2	16.74	204.0	84.1	41.24
Dairy products	4.7	2.9	62.18	22.9	5.9	25.77
Sugar crops	0.0	0.0	NA	0.0	0.0	NA
Grains	0.1	0.0	-0.99	722.8	157.3	21.77
Cattle and horses	0.7	0.0	-2.06	3.4	0.3	10.23
Transportation equipment n.e.c.[2]	4.5	-0.2	-4.01	170.0	42.0	24.72
Motor vehicles and parts	16.0	-0.4	-2.45	372.9	180.4	48.37
Animal products n.e.c.	61.8	-0.9	-1.44	37.3	1.7	4.51
Wood products	156.5	-7.7	-4.91	127.5	42.5	33.38
Metals nec and metal products	154.6	-10.5	-6.80	134.0	14.2	10.59
Ferrous metals	300.3	-14.4	-4.78	325.8	57.3	17.57
Other manufactures	469.6	-16.9	-3.61	1,031.1	234.6	22.75
Petroleum, coal, chemicals, rubber, plastic	473.8	-17.4	-3.68	3,147.8	406.1	12.90
Other crops	746.0	-19.3	-2.59	237.6	17.3	7.28
Coal, oil, gas, other mineral	220.9	-23.2	-10.49	35.5	13.4	37.86
Other processed food and tobacco products	1,126.2	-25.5	-2.27	639.7	53.5	8.37
Vegetables, fruits, and nuts	1,717.5	-31.5	-1.84	53.8	7.7	14.23
Electronic equipment	1,041.7	-56.4	-5.41	1,976.8	110.2	5.58
Other machinery and equipment	1,902.9	-96.4	-5.07	2,010.7	400.6	19.93
Services[2]	1,738.3	-100.0	-5.75	710.4	32.8	4.62
Total	22,308.6	2,776.2	12.44	17,314.03	2,665.6	15.40

[1] The simulated FTA consists of tariff and quota liberalization.
[2] The decline in U.S. imports of many products is a result of the reallocation of resources in the small economies of the partner countries, as they shift output to take advantage of increased export opportunities in other products such as textiles and apparel, and sugar.
[3] No U.S. tariffs or other quantitative import measures for services were removed in this analysis. The changes in trade arise from trade balance, changes in demand, and factor supply. See text.

Source: GTAP version 6, prerelease 1 data and Commission calculations.

Example of Impacts of Effective Preferential Access



Commodity	Code	Country	Imports: Total (US$ '000)	U.S. (%)	Leading countries, excluding U.S.	(%)	ROW (%)	Tariff MFN (%)	Before CAFTA Index (%)		After CAFTA Index (%)		Changes Index (%)	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Regional Preference Before and After CAFTA

COMMODITY	Com code	Country	Imports: Total (US$'000)	U.S. (%)	Leading countries, excluding U.S.	(%)	ROW (%)	Tariff: MFN (%)	Before CAFTA: Index US/Free (%)	Before CAFTA: Index US/MFN (%)	After CAFTA: Index US/Free (%)	After CAFTA: Index US/MFN (%)	Changes: Index US/Free (%)	Changes: Index US/MFN (%)
PEACHES, NECTARINES,	80930													
		Costa Rica	1,026	54.2	Chile	45.	0	14	-14	0	0	12.2	14	12.2
		Dominican Republic	67	89.4	Chile	10.	0	20	-20	0	0	16.6	20	16.6
		El Salvador	693	53.0	Chile	37.	9.	15	-15	0	0	13.0	15	13.0
		Guatemala	931	59.5	Chile	39.	0.	15	-15	0	0	13.0	15	13.0
		Honduras	148	57.1	Chile	30.	12	15	-15	0	0	13.0	15	13.0
		Nicaragua	23	42.5	Costa Rica	52.	5.	15	-15	0	0	13.0	15	13.0

Source: Paggi, Yamazaki, Josling, 2005

DR-CAFTA Demographics

Country	Pop. (mil)	GDP/ Person	Poverty %	Lit. %	Ag. Pop. %
Costa Rica	3.9	$8,300	20.6	96	20
El Salvador	6.5	$4,600	48	80.2	30
Guatemala	13.9	$3,900	75	70.6	50
Honduras	6.7	$2,500	53	76.1	34
Nicaragua	5.1	$2,200	50	67.5	42
Dom. Rep.	8.7	$6,300	25	84.7	17
Total/Avg.	44.8	$4,633	45.3	79.2	32.2

Summary

• Benefits of DR/CAFTA Likely Slow in Coming And More Linked to Economic Development and Stability

•Cost of DR/CAFTA Likely Small, some selected Commodities like melons maybe more effected

•Real Benefits in Maintaining Competitive Preference With other Countries into Selected Markets

•Failure to pass House may spell doom for Doha

•Concessions to sugar suggest storm clouds for special products issues in Doha

Want More

- CAFTA/DR Light: Current Choices Article
- CAFTA/DR Specialty Crop Specific:
  Article on Website:
  www.cati.csufresno.edu/cab
- CAFTA/DR Full Strength: USITC Report
  on their website