



## **The Impact of Section 301 Tariffs on China:**

# **An Analysis of U.S. Import Trends for Indonesia and Select ASEAN Neighbors since 2017**

**Original Publication, December 2020  
Updated, September 2021**

*Prepared by Trade Partnership Worldwide*

*for*

*U.S. Chamber of Commerce in Partnership With APINDO*

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## Introduction

In 2018, the United States began imposing a series of new punitive Section 301 tariffs on imports from China. Ultimately, four tranches of punitive tariffs ranging from 7.5% to 25% were imposed between July 2018 and September 2019, with tariff levels on certain products changing during that period and since. Based on 2017 (pre-tariff) data, Section 301 tariffs impacted \$313 billion, or 62%, of imports from China – leading to rapid supply chain shifts for many products and a desire by many foreign governments and producers to capture a portion of the shifting business.

**This paper update analyzes U.S. import trends from when Section 301 tariffs took effect in mid-2018 through June 2021.** It focuses on the composition of U.S. imports from Indonesia, U.S. import trends for baskets of products subject to new tariffs (e.g., List 1, List 2, List 3, List 4A), and Indonesia’s performance relative to other countries, including:

- Values and shares of U.S. imports from Indonesia by China Section 301 list grouping compared to other countries;
- U.S. import trends for Indonesia and others for products on each China Section 301 list, and
- Specific products on China Section 301 lists, for Indonesia and its ASEAN neighbors, that drove U.S. import trends.

## About the Data Analysis

The evolving nature of China Section 301 tariffs – in terms of products covered, implementation dates, and levels – complicates analyses of sourcing shifts. If the United States had imposed a flat tariff rate on all imports from China on a specific date, exports from all countries would be on a level playing field *relative to China*. But that did not happen, so it is important to look at the extent to which the Section 301 tariffs cover *like* products in other countries, and how that product coverage differs *between* countries. Given the potential for confusion in interpreting technical trade data, below is an explanation of the ways the paper attempts to overcome the challenges detailed above.

First, it creates an “**average tariff advantage**,” or “**ATA**” to compare country-specific opportunities created by the China Section 301 tariffs. A country’s ATA is calculated by multiplying the share of U.S. imports from that country in 2017 on a given China Section 301 List by the rate applied to that list. Here is the basic formula as well as calculations for Indonesia:

$$\begin{aligned} \text{ATA} &= (\% \text{ Imports on List 1} \times 0.25) + (\% \text{ Imports on List 2} \times 0.25) + (\% \text{ Imports on List 3} \times 0.25) + (\% \text{ Imports on List 4A} \times 0.075) \\ \text{Indonesia ATA} &= (3.4\% \text{ on List 1} \times 0.25) + (2.2\% \text{ on List 2} \times 0.25) + (36.5\% \text{ on List 3} \times 0.25) + (51.9\% \text{ on List 4A} \times 0.075) \\ \text{Indonesia ATA} &= (0.85\%) + (0.55\%) + (9.12\%) + (3.89\%) = \mathbf{14.41\%} \end{aligned}$$

ATAs can range from 0% (i.e., no exports to the United States on any China Section 301 List) to 25% (i.e., all exports to the United States on Lists 1-3). The higher the ATA, the better positioned a country was to gain from new tariffs on China, since it was already exporting products that companies may want to shift sourcing out of China.

Second, it uses **trailing 12-month import data** to eliminate issues associated with tariff implementation dates during the calendar year. For example, List 1 tariffs took effect in July 2018, so “pre-List 1” trade data represent imports for July 2017 to June 2018 (i.e., the last full year before the tariffs). This updated report includes data through June 2021.

Third, it **compares Indonesia to four ASEAN neighbors** to analyze performance against similarly situated countries. The four countries are Malaysia, Philippines, Thailand, and Vietnam. Singapore was considered as a fifth comparison country, but Singapore’s exports differed significantly from Indonesia and the others. Specifically, Section 301 list-specific import trends from Singapore were driven by products (e.g., non-monetary gold, turbojet engines) where there was little to no initial China trade and therefore large shifts were unrelated to the China tariffs.

Finally, it uses **indexed import levels** when comparing trends for Indonesia and its ASEAN neighbors (pp. 7-10). Often, the value of imports differs greatly between the countries, so it is difficult to see trend movements in graphs using raw import data. Therefore, for each list of tariffs, countries import levels are set to 100 based on the import value for the 12 months before the tariffs took effect. Graphs then show how much each country’s imports have increased or decreased since tariffs took effect. The reference period changes for each set of tariffs, as noted in the graph titles.

All data are estimated by Trade Partnership Worldwide based on U.S. Census Bureau goods import data and China Section 301 tariff lists published by the Office of the U.S. Trade Representative. Data reflect “Imports for Consumption.”

## Key Findings

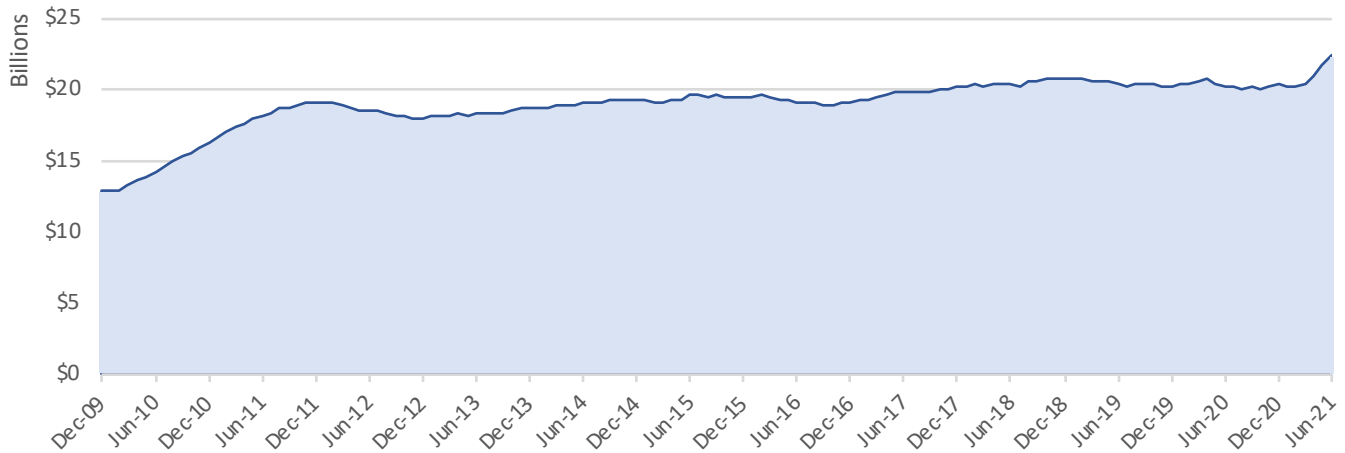
Our analysis of U.S. import trends find that:

- **Despite new tariffs on China, U.S. imports from Indonesia have not increased significantly.** Imports have been remarkably steady, barely fluctuating between \$19.1 billion and \$20.9 billion each year from 2014 to 2020. While U.S. imports from Indonesia have grown in 2021, it is not based on outcompeting other ASEAN countries, whose imports in 2021 have grown even faster.
- **Indonesia was relatively “unlucky” compared to ASEAN neighbors based on the composition of the China Section 301 lists.** Indonesia had the lowest share of exports on Lists 1-2 (i.e., those facing 25% tariffs since summer 2018) and the highest share on List 4A (i.e., those facing no tariffs until late 2019 and whose tariffs were quickly lowered).
- **Product overlap is important but not destiny.** Imports from the Philippines often lagged its ASEAN neighbors despite the highest “average tariff advantage” (ATA), while imports from Vietnam generally outperformed other ASEAN countries despite the lowest ATA.
- **While topline results for imports from Indonesia on Lists 1-2 may seem discouraging, Indonesia has outperformed most ASEAN neighbors and the world.** This was even more true before COVID-19 hit.
  - Imports from Indonesia that have seen large increases include printer and copier parts and accessories, optical fiber cables, certain tractors, and acrylic plastic sheets.
  - Imports from Indonesia that have seen large decreases include electric motors, radio navigational aids, semiconductors, and PET resins.
  - Semiconductors, photosensitive semiconductor devices, and external computer storage devices were products with frequent strong growth from ASEAN neighbors but not Indonesia, though some of this growth seemed to have come at the expense of the Philippines (and not just China).
- **While imports from Indonesia on List 3 have increased – including a 14% increase year-to-date in 2021 – Indonesia has underperformed all of its ASEAN neighbors.** This is true even if excluding the products with the largest declines.
  - Imports from Indonesia that have seen large increases include mattresses, backpacks, and furniture; ASEAN neighbors similarly saw growth in these products.
  - Imports from Indonesia that have seen large decreases include oil and rubber.
  - Computer accessories and power adapters were products with frequent strong growth from ASEAN neighbors but not Indonesia.
- **Imports from Indonesia on List 4A have underperformed most ASEAN neighbors, though these trends pre-date the new China tariffs.** Imports from Indonesia were mostly flat before and after tariffs were imposed, and even strong 9% year-to-date growth in 2021 is less than have of the growth rate for other ASEAN neighbors.
  - Imports from Indonesia that have seen large increases include gold jewelry, electric coffee makers, and telecom base stations, and rubber gloves; Thailand often saw increases in these same products.
  - Imports from Indonesia that have seen large decreases include aluminum sheets and apparel products, though apparel import declines are widespread among ASEAN countries.
  - Solid-state semiconductor storage devices and loudspeakers were two products with strong growth from most ASEAN neighbors but not Indonesia.
- **Past product successes in increasing exports to the United States, both by Indonesia and its ASEAN neighbors, could help Indonesian products identify future exports growth areas.** Between tariffs still at 25% on imports from China and accounting for approximately 40% of U.S. imports from Indonesia, products on List 3 likely represents the best potential growth area going forward.

## U.S. Imports from Indonesia

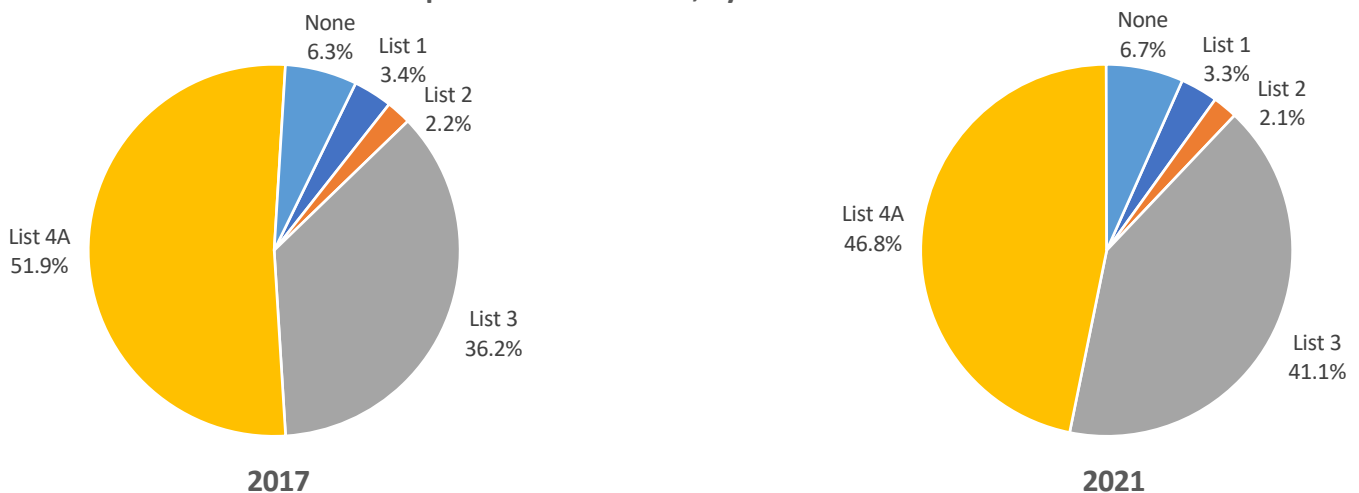
In recent years, the United States has imported around \$20 billion from Indonesia annually. U.S. imports from Indonesia have been remarkably consistent, barely fluctuating between \$19.1 billion and \$20.9 billion each year from 2014 to 2020. During that time Indonesia was between the 19<sup>th</sup> and 24<sup>th</sup> largest source for U.S. goods imports. Imports have increased in 2021, consistent with broad U.S. import increases.

U.S. Imports from Indonesia, Trailing 12 Months



Like many others, Indonesian exporters hope to take advantage of Section 301 tariffs on China to attract new investment and buyers. The graph above shows that those hopes have not been borne out to date, even before COVID-19 impacted global trade flows. But to understand the impacts of Section 301 tariffs on U.S. imports from Indonesia – or potential areas for future growth if Section 301 tariffs remain in place – it is necessary to examine the composition of U.S. imports from Indonesia and how they compare to the Section 301 tariffs imposed in phases starting in mid-2018.

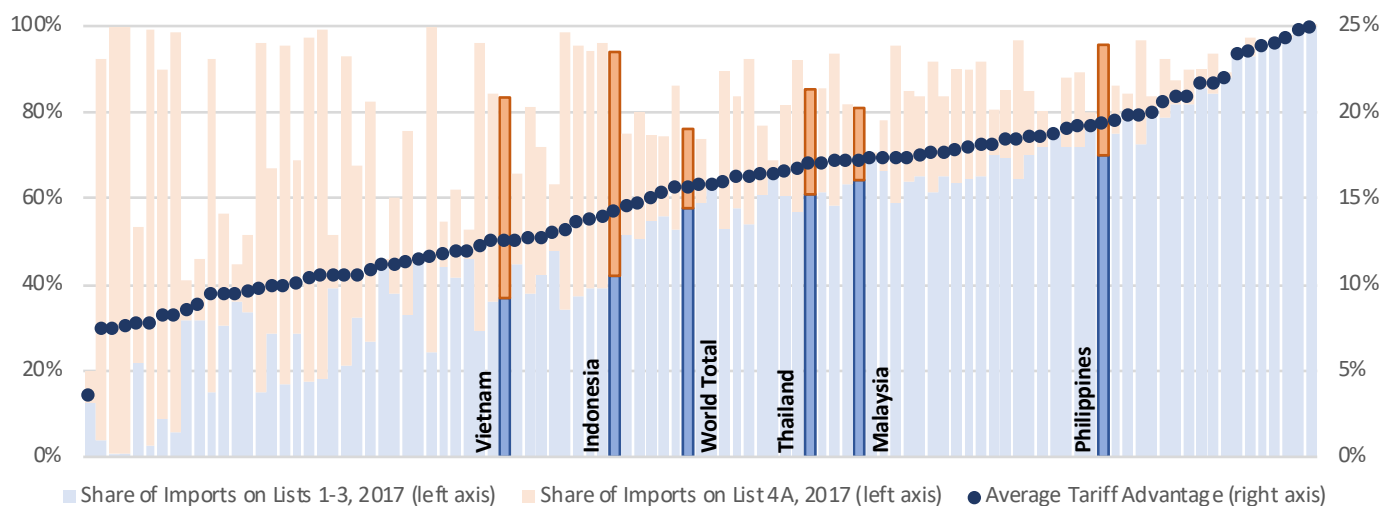
U.S. Imports from Indonesia, by China Section 301 List



While most U.S. imports from Indonesia would face Section 301 tariffs if imported from China, by far the largest category is products on List 4A that took effect in September 2019 – a full year after tariffs on China starting being imposed. There has been little change in the composition of U.S. imports from Indonesia between 2017 and 2020. Products on Lists 1-2 accounted for around 5.5% of U.S. imports in each year. Products on List 3 accounted for 41.1% of U.S. imports from Indonesia in the year ending in June 2021, up from 36.2% in 2017, while the share of imports on List 4A fell from 51.9% in 2017 to 46.8% in the year ending in June 2021. Products not subject to new tariffs when imported from China actually increased their share of U.S. imports from Indonesia.

## Different Countries, Different Opportunities from Section 301 Tariffs on China

### The Great Divergence of Sourcing Shift Opportunities from Section 301 Tariffs on China



As noted in the “About the Data Analysis,” the evolving nature of China Section 301 tariffs complicates analyses of sourcing shifts. It is important to look at the extent to which the Section 301 tariffs cover like products from other countries, and how that product coverage differs *between* countries. Due to different tariff rates for different Section 301 lists, it is helpful to distinguish between products on Lists 1-3 (i.e., currently subject to 25% tariffs) and those on List 4A (i.e., currently subject to 7.5% tariffs).

The graph above shows the range of impacts of the China Section 301 tariffs for the top 100 imports sources (only select countries are labeled for clarity). The blue bars show the share of U.S. imports from a country on Lists 1-3, the orange bars show the share of imports on List 4A, and the blue dots show the “**average tariff advantage**” (ATA) over China. The higher a country’s ATA – or further right on the graph – the better positioned it was to gain from tariffs on China.

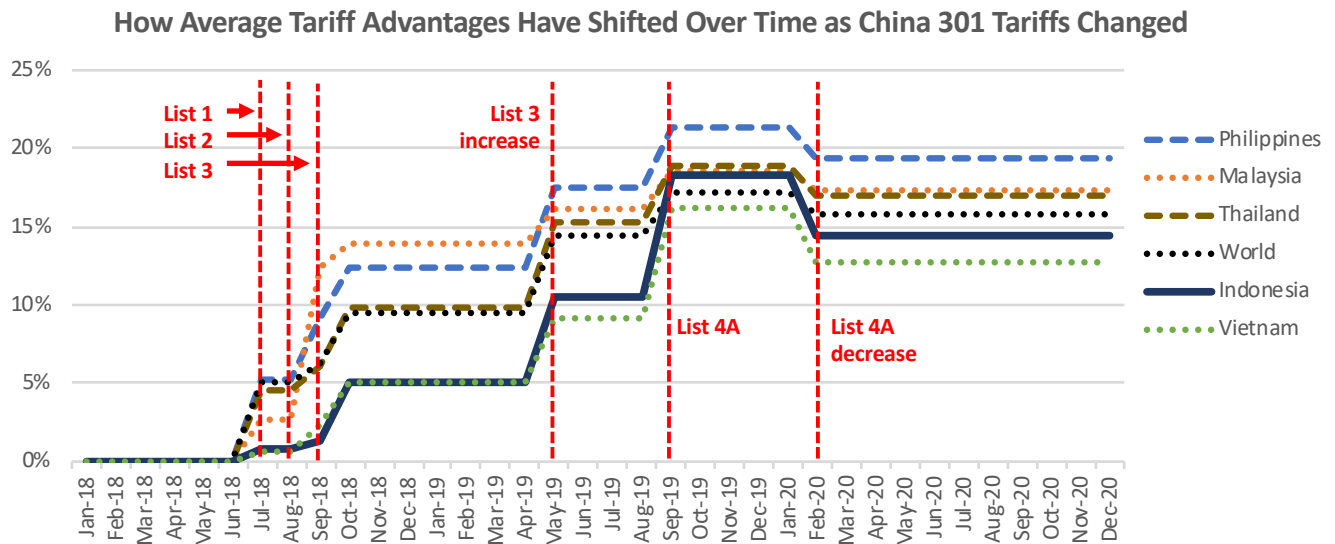
Clearly there are large differences. Lists 1-3 tariffs would cover 58% of world imports, and List 4A another 18%, for an ATA of 15.8%. Though unlabeled, Ireland is on the far left and Libya is on the far right. Section 301 tariffs would cover under 20% of imports from Ireland versus 99.99% from Libya. Their ATAs – 3.7% for Ireland versus 24.99% for Libya – shows Irish products had far fewer chances to take advantage of new China tariffs than Libya (or anyone else).

Compared to the world and most ASEAN neighbors, Indonesia was relatively “unlucky” based on the products included on each China Section 301 list. Indonesia had the second-lowest share (42%) of imports on Lists 1-3, well below Thailand (61%), Malaysia (64%), and the Philippines (70%). The unluckiness applies *within* Lists 1-3 as well. The table below shows Indonesia had the lowest share (6%) of imports on Lists 1-2, which have faced 25% tariffs since summer 2018 and the highest share (52%) of imports on List 4A, which faced no tariffs until September 2019 and were quickly lowered from 15% to 7.5% in February 2020. (Note: Indonesia’s shares by list below match those used in the ATA formula on page 1.)

### Share of Imports by China Section 301 List, 2017, Select Countries

Country	List 1	List 2	List 3	List 4A	No List	Average Tariff Advantage (ATA)
Indonesia	3.4%	2.2%	36.5%	51.9%	6.0%	14.4%
Vietnam	2.6%	7.0%	27.3%	46.5%	16.6%	12.7%
Thailand	18.3%	6.2%	36.5%	24.4%	14.7%	17.1%
Malaysia	10.4%	39.4%	14.5%	16.7%	19.0%	17.3%
Philippines	20.9%	15.4%	33.7%	25.6%	4.4%	19.4%
World	20.1%	4.6%	33.0%	18.4%	23.9%	15.8%

## Different Countries, Different Opportunities from Section 301 Tariffs on China (continued)



The graph above shows how each country’s ATA has changed over time. Using the formula from the “About the Data Analysis” section, it calculates the ATA for each month based on China Section 301 tariffs in effect that month. The February 2020 (and more recent) levels are identical to those in the table on the previous page. Indonesia’s ATA has lagged its ASEAN neighbors from the start of the trade war, meaning there was limited overlap between products facing the highest tariffs when imported from China and those exported from Indonesia.

Products from the Philippines and Thailand gained an immediate advantage when 25% List 1 tariffs were imposed on China in July 2018, since List 1 covered a larger share of imports from those countries. Products from Malaysia gained a big advantage in September 2018 after 25% List 2 tariffs were imposed on China in late August. The Philippines got another big boost after 10% List 3 tariffs took effect in late September 2018. By October 2018, the difference in potential opportunities for ASEAN countries created by China tariffs was very clear. Indonesia’s ATA (5.0%) was just below Vietnam (5.1%) and both were far below the world (9.5%), Thailand (9.8%), and the Philippines (12.5%). Malaysia’s ATA (13.9%) was nearly 3 times higher than Indonesia’s and would remain that way for nearly eight months.

The List 3 tariff increase from 10% to 25% in May 2019 increased Indonesia’s tariff advantage compared to China, but did little to close the gap with its ASEAN neighbors. It was not until List 4A tariffs took effect in September 2019 – fully 14 months after the trade war started – that Indonesian exporters had a similar tariff advantage compared to China as most of its neighbors. The parity was short lived, though, as the List 4A tariff reduction from 15% to 7.5% in February 2020 once again sent Indonesia’s ATA well below the world average and 3-5 percentage points below that of Philippines, Malaysia, and Thailand.

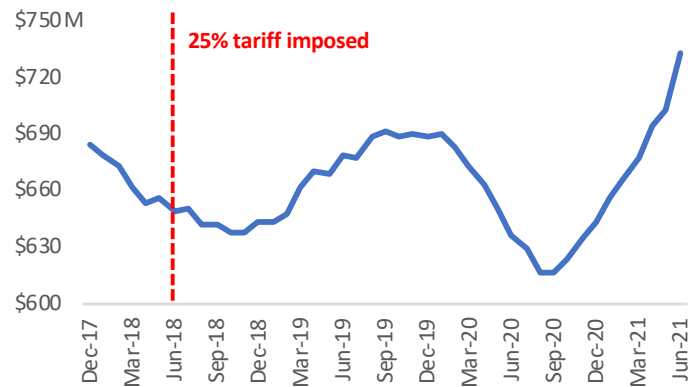
While the product coverage and timing of China Section 301 tariffs are important, they are not destiny. The Philippines might be expected to benefit most based on which products from China faced new tariffs, and when. Yet as shown in later sections, imports from the Philippines often performed worst among ASEAN countries. Conversely, Vietnam is the country whose “opportunities” from China tariffs were most similar to Indonesia, but import growth from Vietnam has generally outperformed all the other countries.

Vietnam may be a special case due to certain advantages before the Section 301 tariffs on China took effect. Imports from Vietnam already were rising rapidly, tripling from \$15 billion in 2010 to \$46 billion in 2017. Potential duty-free treatment under the Trans-Pacific Partnership (TPP), though never realized, likely contributed. It is plausible that significant investments made in Vietnam to take advantage of TPP far outweighed any extra benefits countries like Philippines and Malaysia gained from the luck of the China tariff coverage.

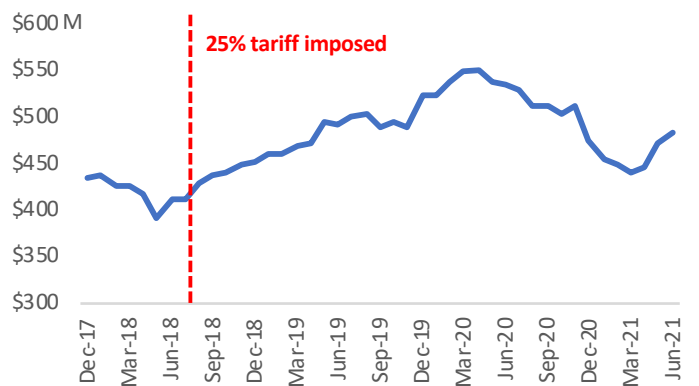
In summary, the trade war came later – and resulted in a lower tariff advantage compared to China – for products imported from Indonesia than from ASEAN neighbors and the world as a whole. That is important context for analyzing Indonesia’s performance compared to neighboring countries since the Section 301 tariffs on China took effect in 2018.

## Summary of U.S. Import Trends from Indonesia for Products on Section 301 Tariff Lists, Trailing 12 Months

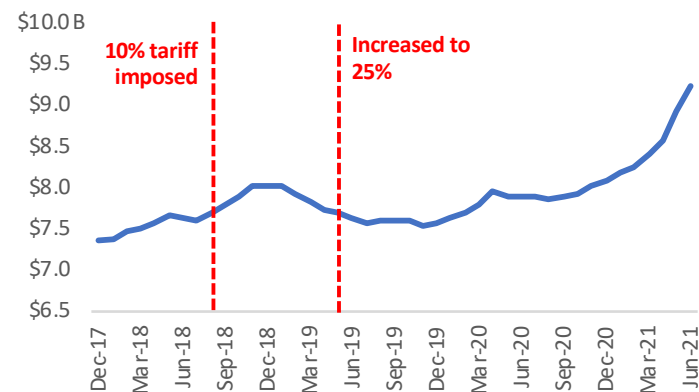
**List 1 Import Trends:** U.S. imports from Indonesia for products on List 1 have seen several big changes. They were falling but started growing soon after 25% tariffs were imposed on China in July 2018. Imports flattened in July 2019 and started falling in early 2020, before turning around again and rising sharply since late 2020. In the year ending June 2021, U.S. imports from Indonesia of List 1 products were nearly 20% higher than their mid-2020 low.



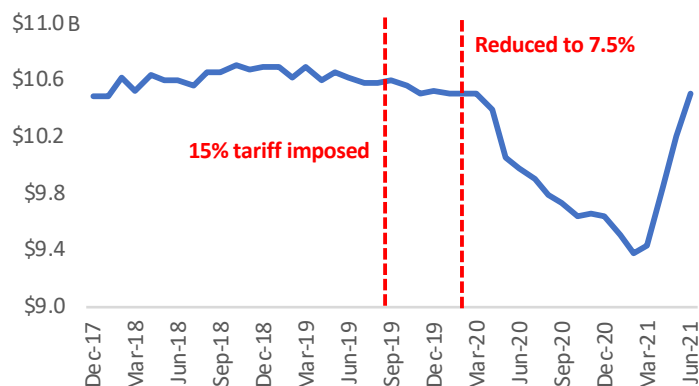
**List 2 Import Trends:** U.S. imports from Indonesia for products on List 2 started rising shortly before 25% tariffs were imposed on China in August 2018. Import levels continued rising and peaked at \$550 million for the 12 months ending in April 2020. The import decline from April to August 2020 matched global trends, but other countries did not see a similar sharp fall from November 2020 to March 2021. Imports from Indonesia have recovered over the last few months, once again in line with ASEAN countries.



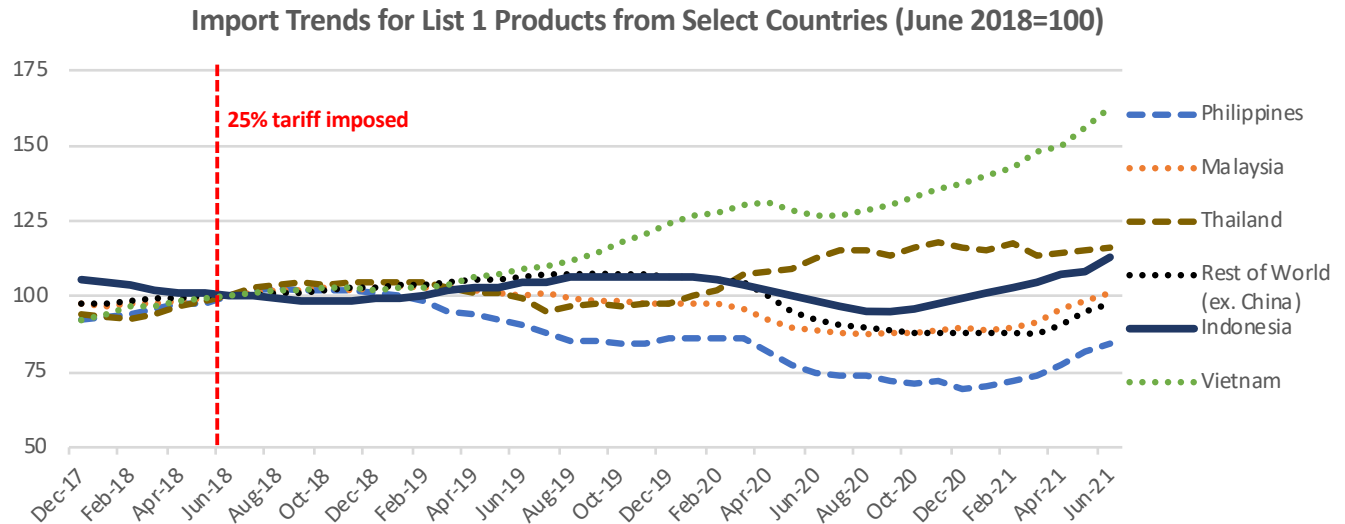
**List 3 Import Trends:** U.S. imports from Indonesia for products on List 3 were rising before 10% tariffs were imposed on China in September 2018. The early 2019 declines likely can be explained by companies drawing down China inventories that were expedited to beat the 25% tariff hike, originally planned for January 1, 2019, but that was delayed until May 2019. Imports from Indonesia have been rising, especially since October 2020. In the year ending June 2021, U.S. imports from Indonesia of List 3 were \$1.4 billion higher than pre-China tariffs.



**List 4A Import Trends:** U.S. imports from Indonesia for products on List 4A were mostly flat before 15% tariffs were imposed on China in September 2019. They remained that way until COVID-19 hit, at which point U.S. imports fell sharply. Indonesia was the only major ASEAN country where imports declined from 2018 to 2019. Malaysia, Thailand, and Vietnam all saw 15-20% growth for List 4A products from 2018 to 2019, while Malaysia and Vietnam saw continued growth in 2020 despite COVID-19. Though Indonesia's declines only stopped in early 2021, they have almost fully recovered.



## List 1 Import Trends: Indonesia and ASEAN Neighbors



**List 1 Import Trend Summary:** Topline results for imports from Indonesia on List 1 have improved significantly since previous reports. The import growth (+13%) from Indonesia since June 2018 compares very favorably to Philippines (-15%), rest of world (-3%), and Malaysia (+1%). Imports from Indonesia have nearly closed the gap with Thailand (+16%), while imports from Vietnam (+63%) and have increased most since List 1 tariffs were imposed on China.

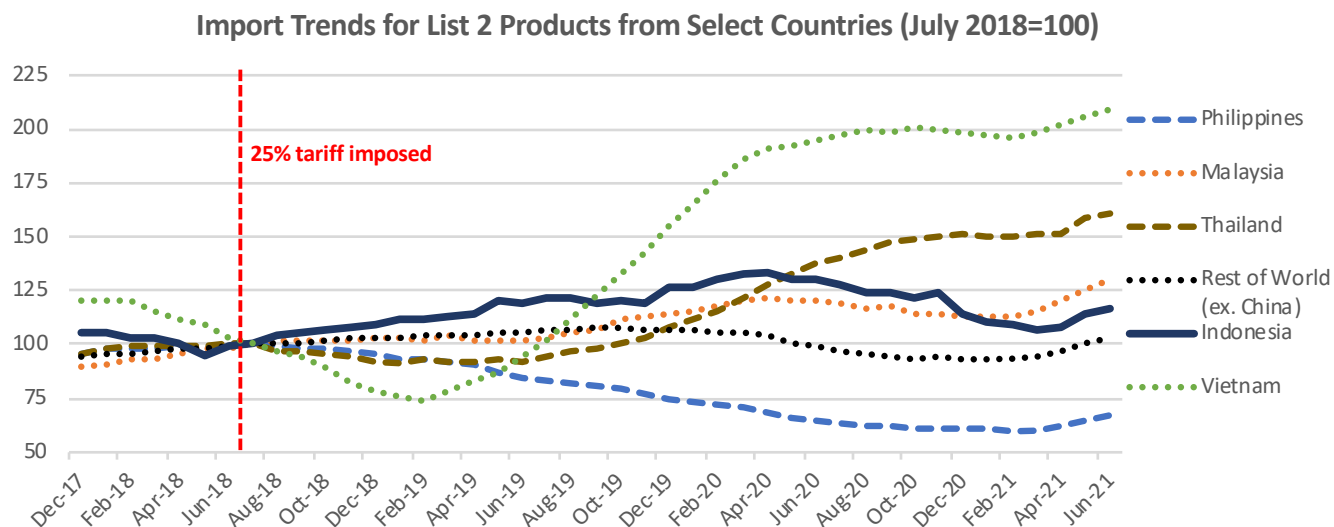
### Product Drivers of Import Trends from Indonesia:

- Positive** – *Printer and copier parts and accessories (HS 8443.39)*: U.S. imports from Indonesia increased from \$115 million in the year before List 1 tariffs were imposed to \$192 million in the year ending in June 2021 (+\$78M, +68%). Imports declined from China (-\$521M), Malaysia (-\$171M), Vietnam (-\$15M), Philippines (-\$1M), rest of world (-\$468M), and increased slightly from Thailand (+\$7M). Imports from Indonesia continued expanding in 2021, while figures from the rest of the world are largely unchanged since December 2020.
- Positive** – *Optical fiber cables (HS 8544.70)*: U.S. imports from Indonesia increased from essentially nothing in the year before List 1 tariffs were imposed to \$26 million in the year ending in June 2021 (+\$26M, +313,264%). Imports declined significantly from China (-\$180M) and increased from Vietnam (+\$57M), Thailand (+\$8M), and rest of world (+\$270M), with minimal changes for Philippines or Malaysia. Imports from Indonesia have continued rising in 2021.
- Negative** – *Radio navigational aids (HS 8526.91); Lithium batteries (HS 8506.50); Small electric motors (HS 8501.10)*: While total imports from Indonesia of List 1 grew by \$84 million, imports of each of the products declined by \$10-\$12 million. For radio navigational aids in particular, declines have been global and imports fell by much greater values from China, Malaysia, Thailand, and the rest of the world. Battery imports generally also are down, though imports of small electric motors often have increased, particularly from Vietnam and the rest of the world.

### Product Drivers of Import Trends for Other Countries:

- Vietnam** – *Passenger vehicles with <1,000cc engines (HS 8703.21)*: +\$99M, +3,523%; *External computer storage devices (HS 8471.70)*: +\$96M, +3,553%; *Measuring and checking instruments (HS 9031.80)*: +\$92M, +4,587%
- Thailand** – *External computer storage devices (HS 8471.70)*: +\$807M, +21%; *Medical instruments and appliances (HS 9018.90)*: +\$84M, +263%; *Gas filtering/purifying machinery (HS 8421.39)*: +\$61M, +2,631%
- Malaysia** – *Thermostats (HS 9032.10)*: +\$137M, +1,628%; *Specialty telecom equipment (HS 9030.40)*: +\$100M, +26%; *Radio navigational aids (HS 8526.91)*: -\$220M, -61%
- Philippines** – *Ceramic fixed capacitors (HS 8532.24)*: +\$40M, +185%; *External computer storage devices (HS 8471.70)*: -\$250M, -23%; *Aerospace parts (HS 8544.30)*: -\$93M, -82%

## List 2 Import Trends: Indonesia and ASEAN Neighbors



**List 2 Import Trend Summary:** Imports from Indonesia on List 2 grew after 25% tariffs were imposed on China in August 2018, but gave up much of those gains. List 2 covers the smallest share of imports from Indonesia and the world, so changes are from a small base. Import growth from Indonesia (+17%) outperformed imports from Philippines (-33%) and rest of world (+3%) but lagged imports from Vietnam (+109%), Thailand (+61%), and Malaysia (+30%).

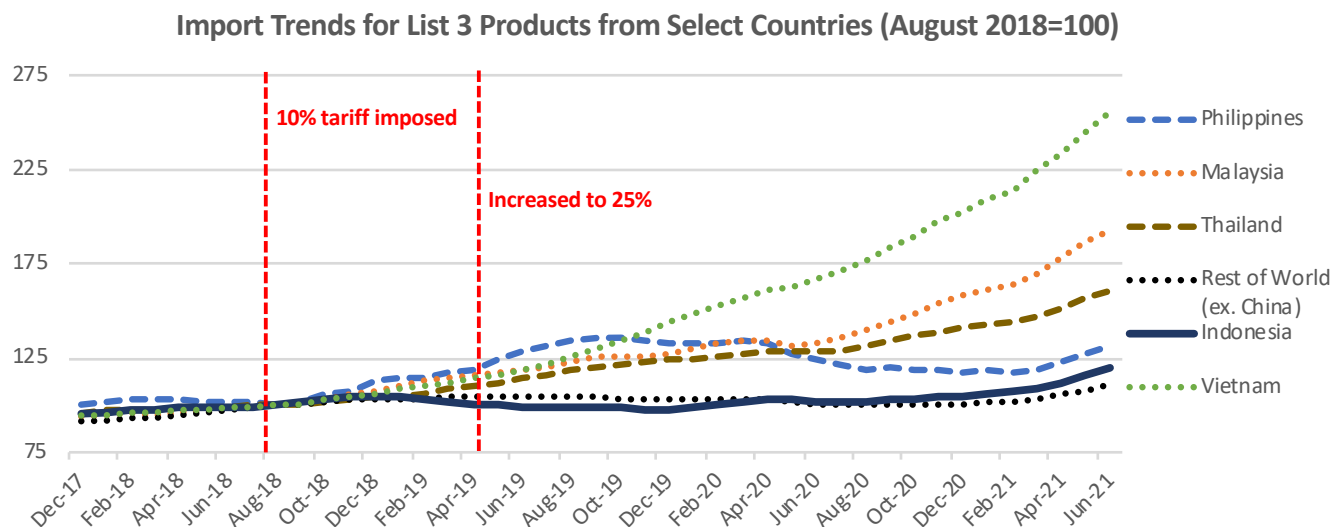
### Product Drivers of Import Trends from Indonesia:

- **Positive** – *Tractors with 25-50 horsepower engines (HS 8701.92)*: U.S. imports from Indonesia increased from \$28 million in the year before List 2 tariffs were imposed to \$63 million in the year ending in June 2021 (+\$63M, +257%). This appears to be a niche product with few imports from ASEAN neighbors, though Thailand is now a growing supplier. Additionally, some Indonesian gains are offset by declines in imports of tractors with other engine sizes (e.g., a \$10 million decline in imports of tractors with less than 25 horsepower engines).
- **Positive** – *Acrylic plastic sheet (HS 3921.50)*: U.S. imports from Indonesia increased from \$25 million in the year before List 2 tariffs were imposed to \$43 million in the year ending in June 2021 (+\$19M, +77%). Covid-related demand for plastic barriers led to increased acrylic sheet imports from many countries, including Thailand (+\$13M), Malaysia (+\$4M), Vietnam (+\$2M), and rest of world (+67M). Though value increases are small, high growth rates high due to low initial import values (e.g., +2,024% for Malaysia) could point to greater competition in the future.
- **Negative** – *PET resins (HS 3907.61-3907.69)*: U.S. imports from Indonesia decreased from \$21 million in the year before List 2 tariffs were imposed to \$3.1 million in the year ending in June 2021 (-\$18M, -85%). Imports were declining before List 2 tariffs took effect: pre-tariff import declines in the first 7 months of 2018 (-\$23M) exceed declines since then. Declines have been global, with imports falling by even greater values (and high percentages) from China, Malaysia, Thailand, and the rest of the world, though imports from Vietnam have increased.

### Product Drivers of Import Trends for Other Countries:

- **Vietnam** – *Photosensitive semiconductor devices (HS 8541.40)*: +\$1.6B, +217%; *Semiconductors (HS 8542.31-8542.39)*: +\$633M, +39%; *Electric machinery (HS 8543.70)*: +\$203M, +427%
- **Thailand** – *Photosensitive semiconductor devices (HS 8541.40)*: +\$851M, +222%; *Iron/steel structures and parts (HS 7308.10-7308.90)*: +\$170M, +1,104%; *PET resins (HS 3907.61-3907.69)*: -\$58M, -92%
- **Malaysia** – *Semiconductors (HS 8542.31-8542.39)*: +\$2.9B, +20%; *Photosensitive semiconductor devices (HS 8541.40)*: +\$1.2B, +90%; *Semiconductor manufacturing machinery (HS 8486.20)*: +\$261M, +1,963%
- **Philippines** – *Semiconductors (HS 8542.31-8542.39)*: -\$580M, -36%; *Photosensitive semiconductor devices (HS 8541.40)*: -\$46M, -75%; *Electric motors (HS 8501.10)*: -\$30M, -64%

### List 3 Import Trends: Indonesia and ASEAN Neighbors



**List 3 Import Trend Summary:** Imports from Indonesia on List 3 have performed worse than any ASEAN neighbor since 10% tariffs were imposed on China in September 2018 and raised to 25% in May 2019. While trends have been much better of late, import growth from Indonesia (+20%) significantly lagged Vietnam (+156%), Malaysia (+93%), Thailand (+61%), and Philippines (+32%). Indonesia’s growth was ahead of the rest of world (+11%).

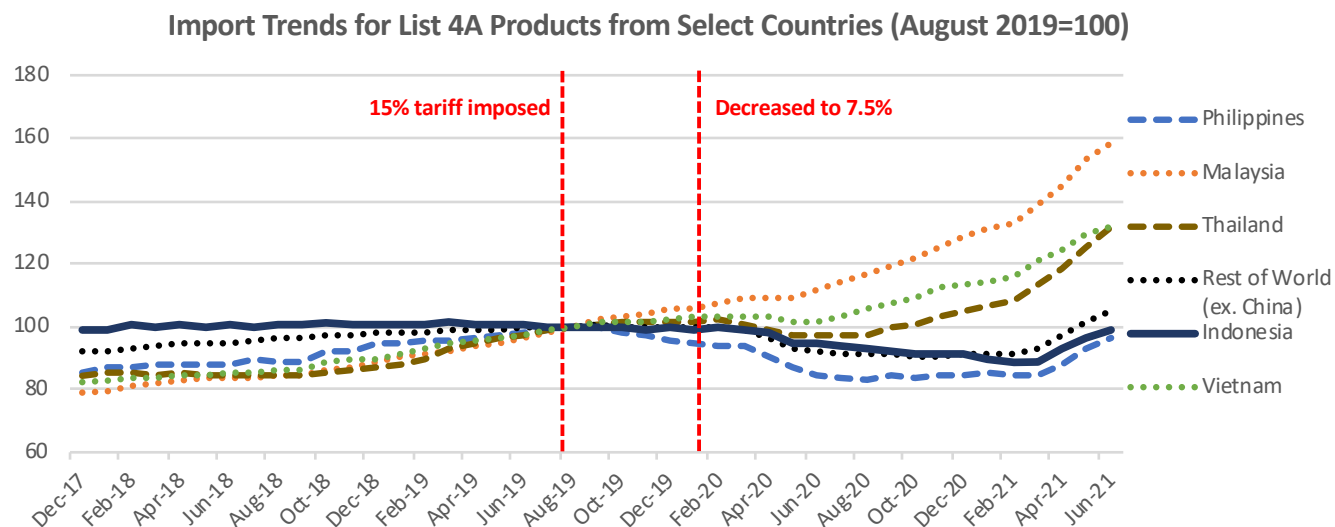
#### Product Drivers of Import Trends from Indonesia:

- **Positive – Mattresses (HS 9404.21-9404.29):** U.S. imports from Indonesia increased from just \$1.4 million in the year before List 3 tariffs were imposed to \$374 million in the year ending in June 2021 (+\$348M, +23,980%). While import declines from China (-\$877M) were offset by increases from Indonesia, Vietnam (+\$190M), Malaysia (+\$112M), Thailand (+\$52M), Philippines (+\$15M), and the rest of world (+402M), imports from ASEAN countries generally are lower than when the last report was published.
- **Positive – Prepared shrimp (HS 1605.21):** U.S. imports from Indonesia increased from \$236 million in the year before List 3 tariffs were imposed to \$463 million in the year ending in June 2021 (+\$228M, +7%). It is among the biggest growth imports from Indonesia in 2021. Imports from Vietnam (+\$186M) and rest of world (+\$248M) also increased and helped offset declines from China (-\$175M) and Thailand (-\$62M).
- **Negative – Crude oil (HS 2709.00); Rubber (HS 4001.21-HS 4001.29):** U.S. imports of crude oil from Indonesia decreased from \$718 million in the year before List 3 tariffs were imposed to \$0 in the year ending in June 2021 (-\$718M, -100%). Excluding crude oil, imports from Indonesia on List 3 would have increased by nearly \$2.25 billion but growth still would have been well below the Philippines. Imports of natural rubber, declining before tariffs took effect, fell from \$961 million to \$652 million (-\$309M, -32%), but appear to have leveled off in 2021.

#### Product Drivers of Import Trends for Other Countries:

- **Vietnam – Seats (HS 9401.10-HS 9401.90):** +\$3.1B, +229%; *Wooden furniture excluding seats (HS 9403.30-9403.60):* +\$3.0B, +103%; *Computer accessories (HS 8473.30):* +\$1.8B, +2,037%
- **Thailand – Tires (HS 4011.10-4011.90):** +\$949M, +46%; *External computer storage devices (HS 8471.70):* +\$749M, +199%; *Power cords and adapters (HS 8504.40):* +\$407M, +150%
- **Malaysia – Wooden furniture excluding seats (HS 9403.30-9403.60):** +\$908M, +146%; *Computer accessories (HS 8473.30):* +\$549M, +253%; *Computers (HS 8471.50):* +\$421M, +465%
- **Philippines – Computer accessories (HS 8473.30):** +\$363M, +37%; *Power cords and adapters (HS 8504.40):* +\$188M, +52%; *Prepared crab (HS 1605.10):* -\$48M, -46%

## List 4A Import Trends: Indonesia and ASEAN Neighbors



**List 4A Import Trend Summary:** Imports from Indonesia on List 4A have seen some of the least movement, both before and after tariffs were imposed on China in September 2019. Essentially flat imports since then from Indonesia (-1%) lagged Malaysia (+58%), Vietnam (+32%), Thailand (+32%), and rest of world (+5%), but slightly outperformed the Philippines (-4%).

### Product Drivers of Import Trends from Indonesia:

- **Positive** – *Gold jewelry (HS 7113.19)*: U.S. imports from Indonesia increased from \$330 million in the year before List 4A tariffs were imposed to \$784 million in the year ending in June 2021 (+\$454M, +137%). There has been a large decline from China (-\$658M), and Indonesia is the top ASEAN beneficiary country. Imports increased from Thailand (+\$164M), Vietnam (+\$44M) and especially the rest of world (+\$2.5B), with much of the gains coming in 2021.
- **Positive** – *Electric coffee or tea makers (HS 8516.71)*: U.S. imports from Indonesia increased from \$1 million in the year before List 4A tariffs were imposed to \$99 million in the year ending in June 2021 (+\$98M, +9,299%). There has been a large decline from China (-\$96M), but it has been more than offset by increases from Indonesia, Thailand (+\$170M), Malaysia (+\$87M), and the rest of world (+\$58M).
- **Negative** – *Aluminum sheets (HS 7606.12); Men’s/boys’ cotton shirts (HS 6205.20); TV reception equipment (HS 8528.71)*: U.S. imports of aluminum sheet from Indonesia decreased from \$207 million in the year before List 4A tariffs were imposed to \$1 million in 2020 (-\$206M, -99%). Imports increased from Thailand (+\$71M) but decreased sharply from China (-\$75M) and the rest of the world (-\$1.4B). Men’s/boys’ cotton shirts was the second largest decline from Indonesia (-\$162M, -64%), but ASEAN suppliers, China, and the rest of world saw similar declines. TV reception equipment, one of the “positive” product drivers in the March 2021 report update, have declined sharply in 2021 and now are below pre-List 4A tariff levels.

### Product Drivers of Import Trends for Other Countries:

- **Vietnam** – *Electric hand tools (HS 8467.29)*: +\$1.1B, +97,273%; *Color TVs (HS 8528.72)*: +\$589M, +2,093%; *Loudspeakers (HS 8518.22)*: +\$528M, +3,599%
- **Thailand** – *Computers (HS 8471.49)*: +\$377M, +458,957%; *Digital cameras (HS 8525.80)*: +\$220M, +47%; *Solid state semiconductor storage devices (HS 8523.51)*: +\$215M, +367%
- **Malaysia** – *Printer accessories and parts (HS 8443.99)*: +\$764M, +54%; *Solid state semiconductor storage devices (HS 8523.51)*: +\$703M, +91%; *Loudspeakers (HS 8518.22)*: +\$180M, +1,070%
- **Philippines** – *Solid state semiconductor storage devices (HS 8523.51)*: +\$136M, +23%; *Industrial ovens/stoves (HS 8419.81)*: -\$61M, -68%; *Man-made fiber sweaters (HS 6110.30)*: -\$57M, -52%

## Conclusion

In many ways, Indonesia was unlucky in the way Section 301 tariffs impacted its existing exports to the United States. Few major Indonesia exports were covered by the initial 25% Lists 1-2 tariffs that took effect in 2018, most Indonesian exports gained no advantage compared to China until 14 months after the trade war started, and even those tariffs were quickly lowered and are now a less than one-third the level of Lists 1-3.

An initial reading of the import data also can be misleading. U.S. imports from Indonesia of products on Lists 1-2 appear to have done poorly, when in fact Indonesia has outperformed most ASEAN neighbors and the world. These are simply products where overall U.S. imports have been declining. Indonesia exporters can focus on products where there has been growth – printers and accessories, thermostats, tractors, acrylic plastic sheet – but as a group products on Lists 1-2 are likely to remain a relatively small share of U.S. imports from Indonesia, especially if U.S. imports of these products from all countries continue to underperform compared to other products.

Conversely, in value terms U.S. imports from Indonesia of products on List 3 have increased the most, yet Indonesia has underperformed all of the ASEAN neighbors. With tariffs still at 25% on imports from China, and List 3 products accounting for approximately 40% of U.S. imports from Indonesia, this group likely represents the best potential growth area. In addition to products successes such as mattresses, backpacks, and prepared seafoods, Indonesian exporters may want to look at products where ASEAN neighbors have been successful at attracting new customers, such as furniture, computer accessories, external storage devices, and power adapters. Competition for these products is presumably fierce, but success across countries suggests that U.S. importers are not concentrating all of their purchases in “one new country.” This could provide continued opportunities to attract new business for Indonesian exporters.

The performance of U.S. imports from Indonesia of products on List 4A is likely the most disappointing, if only because they account for the largest share of Indonesian exports. Yet List 4A products may be the area where Indonesia’s export trends are hardest to reverse. U.S. imports from Indonesia stagnated before any China tariffs were imposed, and even the 15% tariff did not spur increases. The current 7.5% tariff, especially compared to the 25% tariff for Lists 1-3, means that Indonesian producers must be much closer to Chinese producers in price, quality, and other factors for the tariffs to make a difference. Indonesian producers can and should focus on growing exports of success stories, such as gold jewelry and electric appliances, as well as success stories of ASEAN neighbors such as solid-state semiconductor devices, but future growth in these areas seems less likely to be driven by Section 301 tariffs than overall competitiveness issues.

**The conclusions above are nearly unchanged from both the initial report (based on data through August 2020) and the first update (based on data through December 2020) due to remarkably consistent trade patterns.** A rising tide lifts all boats, but does not change their positions relative to one another. For Indonesia, import changes from December 2020 to June 2021 have been about 10.5 percentage points higher than from August 2020 to December 2020 regardless of which Section 301 list is considered:

- Combined imports from Indonesia of products on Lists 1-2 increased 8.8% (vs. -1.8%);
- Imports from Indonesia of products on List 3 increased by 14.0% (vs. +3.5%), and
- Imports from Indonesia of products on List 4A increased by 9.0% (-1.7%).

Yet imports from ASEAN neighbors grew even faster from December 2020 to June 2021:

- Combined imports from ASEAN neighbors of products on Lists 1-2 increased 10.6% (vs. +8.8% for Indonesia);
- Combined imports from ASEAN neighbors of products on List 3 increased by 20.7% (vs. +14.0% for Indonesia), and
- Combined imports from ASEAN neighbors of products on List 4A increased by 18.9% (vs. +9.0% for Indonesia).

As such, the last six months have been “better” if looking at Indonesia’s performance in a vacuum but still “below-average” when looking at regional performance.

## Appendix 1: List 1 Import Top Products - Indonesia and ASEAN Neighbors

The tables below show changes in U.S. imports from Indonesia since List 1 tariffs were imposed on China in July 2018. Current tariffs on China are 25%. "Pre-tariff" data cover imports from July 2017-June 2018; "current" data cover July 2020-June 2021. Change data show the difference in U.S. imports between the pre-tariff and the current period. All dollar value data are in millions. Key sector codes and full HTS descriptions for listed products are in Appendix 5.

### Products where U.S. imports from **Indonesia have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
844399: Printer and copier parts	4	114.7	192.8	78.1	68%	-171.2	-0.9	6.8	-14.6
854470: Optical fiber cables	4	0.0	25.8	25.8	313,264%	-0.2	-2.8	7.8	57.0
853890: Parts for electrical controls	4	9.9	20.8	10.9	111%	34.8	0.1	5.3	0.7
903210: Thermostats	na	6.9	17.4	10.5	152%	136.7	0.0	6.8	51.3
853941: Arc lamps	4	1.5	9.7	8.2	531%	0.0	-21.7	-0.9	0.0
853649: Electrical relays	4	16.4	23.3	6.9	42%	-0.4	-0.1	1.5	1.1
850440: Power supplies	4	24.0	29.8	5.8	24%	1.3	-4.7	11.0	0.3
853222: Fixed capacitors	4	9.0	14.6	5.6	62%	-16.2	0.1	0.4	0.5
880330: Aerospace parts	na	0.9	5.3	4.4	483%	-56.8	-93.1	-2.3	-92.4
848190: Valve parts	na	2.0	5.0	3.0	154%	5.2	-1.5	-2.0	9.8

### Products where U.S. imports from **Indonesia have decreased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
850110: Electric motors	4	21.8	10.0	-11.8	-54%	3.8	11.2	3.9	33.0
852691: Radio navigational equipment	4	14.1	2.8	-11.4	-81%	-220.3	4.0	-128.6	-0.2
850650: Lithium batteries	4	31.2	21.7	-9.5	-31%	-5.5	0.1	-1.4	-0.1
903180: Measuring & checking instruments	na	11.6	4.1	-7.5	-65%	-1.1	-17.3	17.1	92.2
853650: Electrical switches	4	26.3	18.9	-7.4	-28%	-8.6	-2.7	5.7	19.0
854129: Transistors	4	8.8	1.6	-7.2	-81%	-37.1	7.2	-11.4	1.6
854411: Insulated copper wire	4	23.3	17.2	-6.2	-26%	0.4	0.3	-0.3	-2.9
843149: Derrick parts and attachments	na	18.3	12.5	-5.8	-32%	-0.2	-0.1	23.8	18.6
854390: Parts of electric machinery	4	8.4	2.9	-5.4	-65%	-4.2	-3.8	-0.3	3.1
848210: Ball bearings	na	9.5	5.8	-3.7	-38%	-1.7	-0.8	-3.8	-1.1

### Products where U.S. imports from **ASEAN neighbors have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
847170: Computer storage devices	4	1.4	0.4	-1.0	-74%	-148.8	-249.9	806.6	96.0
903210: Thermostats	na	6.9	17.4	10.5	152%	136.7	0.0	6.8	51.3
842139: Filtering/purifying machinery	na	0.8	1.0	0.3	33%	51.0	1.0	61.2	4.3
903040: Telecommunications instruments	na	0.3	0.3	0.1	31%	99.8	-0.0	2.0	0.2
870321: Passenger vehicles	na	0.0	0.0	0.0	na	0.0	0.0	0.0	98.8
901890: Medical instruments	2	32.0	29.4	-2.6	-8%	4.8	6.9	83.8	3.2
854190: Transistor, semiconductor parts	4	0.3	0.8	0.6	211%	59.6	-0.7	0.2	35.3
903180: Measuring & checking instruments	na	11.6	4.1	-7.5	-65%	-1.1	-17.3	17.1	92.2
847990: Appliance parts	na	0.5	1.7	1.2	269%	8.8	-2.3	57.9	6.4
903082: Semiconductor checking instruments	na	0.1	0.0	-0.0	-57%	53.2	14.2	0.0	2.3

## Appendix 2: List 2 Import Top Products - Indonesia and ASEAN Neighbors

The tables below show changes in U.S. imports from Indonesia since List 1 tariffs were imposed on China in late Aug. 2018. Current tariffs on China are 25%. “Pre-tariff” data cover imports from Sept. 2017-Aug. 2018; “current” data cover July 2020-June 2021. Change data show the difference in U.S. imports between the pre-tariff and the current period. All dollar value data are in millions. Key sector codes and full HTS descriptions for listed products are in Appendix 5.

### Products where U.S. imports from **Indonesia have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
870192: Tractors	na	17.6	63.0	45.4	257%	0.0	0.0	15.1	0.1
271019: Non-crude oil	na	105.6	136.0	30.4	29%	2.7	0.0	-2.8	0.0
392051: Plastic plates and sheets	na	24.6	43.5	18.9	77%	3.7	0.0	13.4	2.3
730820: Iron or steel towers	na	26.8	41.7	14.9	56%	185.8	0.0	-0.2	-3.1
854370: Electric machinery	4	8.6	15.5	6.9	81%	146.1	14.2	-45.4	203.1
730890: Iron or steel structures (other)	na	0.0	6.6	6.6	50,748%	58.8	-2.3	163.9	53.9
392062: Plastic plates and sheets	na	10.1	15.9	5.8	57%	0.0	0.0	14.3	1.4
391910: Plastic plates and sheets	na	9.4	15.0	5.5	59%	8.9	0.0	-1.3	3.4
850300: Parts electric motors	4	4.6	9.3	4.7	102%	-12.0	-1.8	12.3	12.6
392113: Plastic plates and sheets	na	1.7	5.8	4.2	246%	9.1	-0.1	6.9	9.9

### Products where U.S. imports from **Indonesia have decreased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
854239: Semiconductors	4	45.5	16.0	-29.5	-65%	-15.8	-290.5	96.9	-1.7
390761: PET resin	na	13.8	2.4	-11.4	-82%	-25.5	2.2	-48.6	100.4
870191: Tractors	na	15.1	5.3	-9.8	-65%	0.0	0.0	1.5	0.0
860719: Railroad axles, wheels and parts	na	8.9	0.7	-8.2	-92%	0.0	0.0	0.0	0.2
853710: Control panels	4	8.0	0.6	-7.5	-93%	-0.1	6.0	-4.9	0.6
854231: Semiconductors	4	19.8	12.8	-6.9	-35%	3,147.4	-201.8	78.5	631.4
390769: PET resin	na	7.0	0.7	-6.4	-90%	2.1	0.2	-9.3	-7.0
853650: Electrical switches	4	10.8	4.8	-6.0	-55%	-7.1	-1.5	4.7	4.1
870194: Tractors	na	6.0	0.0	-6.0	-100%	0.0	0.0	0.0	0.0
848330: Bearing housings	na	9.7	7.9	-1.9	-19%	1.4	0.1	-1.3	11.8

### Products where U.S. imports from **ASEAN neighbors have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
854231: Semiconductors	4	19.8	12.8	-6.9	-35%	3,147.4	-201.8	78.5	631.4
854140: Photosensitive semicond. devices	4	7.1	7.5	0.5	7%	1,170.5	-46.5	851.3	1,628.2
854370: Electric machinery	4	0.0	6.6	6.6	50,748%	58.8	-2.3	163.9	53.9
730890: Iron or steel structures (other)	na	26.8	41.7	14.9	56%	185.8	0.0	-0.2	-3.1
848620: Semiconductor mfg. machines	na	0.1	3.1	3.0	3,028%	2.2	0.0	12.3	26.2
730820: Iron or steel towers	na	1.7	5.8	4.2	246%	9.1	-0.1	6.9	9.9
902920: Speedometers	na	0.3	1.8	1.5	540%	0.0	-0.0	14.9	8.2
392010: Plastic plates and sheets	na	0.0	0.0	0.0	na	19.2	0.0	-1.1	-0.0
848690: Semiconductor mfg. machine parts	na	0.0	0.0	0.0	na	-0.9	-13.0	-0.6	26.6
854449: Insulated electric conductors	4	0.0	2.5	2.5	111,626%	0.4	-0.0	8.6	2.6

### Appendix 3: List 3 Import Top Products - Indonesia and ASEAN Neighbors

The tables below show changes in U.S. imports from Indonesia since List 3 tariffs were imposed on China in late Sept. 2018. Current tariffs on China are 25%. “Pre-tariff” data cover imports from Oct. 2017-Sept. 2018; “current” data cover July 2020-June 2021. Change data show the difference in U.S. imports between the pre-tariff and the current period. All dollar value data are in millions. Key sector codes and full HTS descriptions for listed products are in Appendix 5.

#### Products where U.S. imports from **Indonesia have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
940421: Mattresses	6	1.2	287.3	286.0	23,659%	99.0	13.6	44.8	187.6
160521: Prepared shrimp	5	235.7	463.4	227.7	97%	0.1	0.7	-62.0	185.8
851762*: Data transmission devices	4	0.5	190.0	189.5	40,169%	575.4	352.2	757.0	2,345.4
441233*: Plywood	na	0.0	146.4	146.4	na	43.7	0.0	32.5	383.6
940360: Wooden furniture (other)	6	240.9	360.8	120.0	50%	252.4	-11.2	103.3	1,741.8
940340: Wooden furniture (kitchen)	6	8.6	112.7	104.2	1,214%	462.5	18.5	63.2	534.4
420292: Backpacks	na	78.7	180.7	102.0	130%	3.5	59.8	25.0	108.8
401110: Car tires	8	491.8	577.5	85.7	17%	83.0	5.0	176.5	90.9
853710: Control panels	4	33.8	117.6	83.8	248%	106.1	-6.1	78.3	279.2
850990: Appliance parts	4	0.0	74.8	74.8	na	0.1	0.0	0.2	-0.0

#### Products where U.S. imports from **Indonesia have decreased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
270900: Crude oil	na	718.2	0.0	-718.2	-100%	0.0	0.0	-18.4	-20.9
400122: Natural rubber	8	938.7	630.1	-308.6	-33%	0.9	-0.0	28.7	-3.2
441231*: Plywood	na	306.7	89.0	-217.7	-71%	-35.3	0.0	-0.0	12.1
271019: Non-crude oil	na	179.3	85.6	-93.7	-52%	-109.3	0.0	-64.8	-102.9
160510: Prepared crab	5	338.0	284.8	-53.2	-16%	-0.1	-48.5	-12.6	-4.8
852721: Car radio equipment	4	117.7	65.8	-51.9	-44%	18.3	0.2	113.4	-10.9
441232*: Plywood	na	43.2	0.0	-43.2	-100%	-19.4	0.0	-7.6	-126.1
420291: Leather container bags	na	58.7	35.0	-23.7	-40%	-0.1	-7.5	6.4	-54.6
420221: Leather handbags	na	66.9	48.5	-18.4	-27%	0.1	-6.8	-0.1	44.2
271129: Petroleum gases	na	15.5	0.0	-15.5	-100%	-1.1	0.0	-2.4	-3.5

#### Products where U.S. imports from **ASEAN neighbors have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
851762*: Data transmission devices	4	0.5	190.0	189.5	40,169%	575.4	352.2	757.0	2,345.4
847330: Computer parts and accessories	4	8.1	29.8	21.7	269%	548.9	362.7	113.1	1,773.4
940161: Upholstered seats	6	47.9	73.3	25.4	53%	126.6	0.4	78.4	2,331.6
940360: Wooden furniture (other)	6	240.9	360.8	120.0	50%	252.4	-11.2	103.3	1,741.8
850440: Power supplies	4	8.7	17.4	8.8	102%	186.3	188.4	407.3	712.8
401519: Rubber gloves	2	65.6	114.4	48.8	74%	802.6	0.0	450.4	64.0
940340: Wooden furniture (kitchen)	6	8.6	112.7	104.2	1,214%	462.5	18.5	63.2	534.4
401120: Bus or truck tires	8	130.3	165.0	34.7	27%	17.3	46.9	664.0	246.1
940320: Metal furniture	6	17.7	48.0	30.3	172%	34.9	-3.1	171.5	628.1
940350: Wooden furniture (bedroom)	6	180.3	216.5	36.2	20%	187.0	-0.2	-6.1	644.7

\* HTS code changes during the reference period means changes may reflect data unavailability as opposed to changes in trade levels. In some cases, changes may be offsetting (e.g., the “growth” and “decline” plywood are the same products, but now reported under a new HTS code).

## Appendix 4: List 4A Import Top Products - Indonesia and ASEAN Neighbors

The tables below show changes in U.S. imports from Indonesia since List 4A tariffs were imposed on China in Sept. 2019. Current tariffs on China are 7.5%. "Pre-tariff" data cover imports from Sept. 2018-Aug. 2019; "current" data cover July 2020-June 2021. Change data show the difference in U.S. imports between the pre-tariff and the current period. All dollar value data are in millions. Key sector codes and full HTS descriptions for listed products are in Appendix 5.

### Products where U.S. imports from **Indonesia have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
711319: Jewelry	na	330.1	783.8	453.7	137%	5.8	-1.3	164.2	43.9
151190: Palm oil	5	501.2	786.5	285.3	57%	-91.4	0.4	0.0	0.0
851762*: Data transmission devices	4	53.5	244.1	190.5	356%	626.1	110.2	1,175.8	2,298.1
851671: Electric coffee makers	4	1.1	99.5	98.4	9,299%	87.0	-0.2	169.9	-0.0
851761: Telecom base stations	4	46.4	130.2	83.8	181%	-7.4	0.0	4.8	-33.2
401519: Rubber gloves	2	57.5	128.9	71.4	124%	2,370.6	0.0	448.1	68.0
640391: Footwear	7	180.7	245.9	65.2	36%	0.1	-3.0	5.8	57.7
151329: Palm Kernel Oil	5	233.0	295.6	62.6	27%	17.4	-1.4	0.0	0.0
610462: Women's and girls' pants	3	205.1	264.1	59.0	29%	-1.0	-0.3	-1.0	118.6
382319: Industrial fatty acids	na	85.7	143.5	57.8	67%	-34.4	0.0	0.2	0.0

### Products where U.S. imports from **Indonesia have decreased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
760612: Aluminum plates	na	207.5	1.4	-206.1	-99%	0.9	-0.0	70.8	-0.6
620520: Men's/boys' shirts	3	250.9	89.2	-161.7	-64%	-72.1	-15.4	0.5	-98.0
620640: Women's/girls' shirts	3	276.6	126.7	-149.9	-54%	-0.1	-5.0	-0.1	-87.0
180400: Cocoa butter	5	286.7	170.3	-116.5	-41%	0.1	0.0	0.0	0.0
721891: Semifinished steel products	na	98.3	0.0	-98.3	-100%	0.0	0.0	0.0	0.0
640411: Footwear	7	548.7	450.8	-97.9	-18%	0.0	-1.4	0.3	125.1
090111: Coffee	5	287.1	196.7	-90.5	-32%	1.5	-0.1	-0.3	-81.5
620462: Women's/girls' pants	3	187.5	103.1	-84.4	-45%	-0.9	-4.4	-0.7	11.6
611030: Man-made fiber sweaters	3	320.1	235.8	-84.2	-26%	-4.3	-56.8	-49.5	-197.1
620331: Men's and boys' jackets	3	60.6	9.2	-51.4	-85%	-0.0	0.0	-4.5	-20.2

### Products where U.S. imports from **ASEAN neighbors have increased** the most

HTS6: Short Description	Key Sector	Indonesia (Pre-Tariff)	Indonesia (Current)	Indonesia Change (\$)	Indonesia Change (%)	Malaysia Change (\$)	Philippines Change (\$)	Thailand Change (\$)	Vietnam Change (\$)
851762*: Data transmission devices	4	53.5	244.1	190.5	356%	626.1	110.2	1,175.8	2,298.1
401519: Rubber gloves	2	57.5	128.9	71.4	124%	2,370.6	0.0	448.1	68.0
846729: Electric handtools	na	0.0	0.0	-0.0	-100%	-0.5	-0.1	26.6	1,126.9
852351: Semiconductor storage devices	4	0.0	0.1	0.0	115%	702.8	136.1	215.3	-2.4
844399: Printer and copier parts	4	10.5	26.1	15.5	148%	764.4	21.1	14.8	13.3
851822: Loudspeakers	4	16.8	13.7	-3.1	-18%	179.8	-0.3	45.9	528.5
630790: Textile articles (e.g., face masks)	2	3.6	18.8	15.2	425%	2.8	1.6	44.0	531.1
852872: Televisions and equipment	4	0.1	0.0	-0.1	-100%	0.1	0.0	-56.7	588.7
852580: Cameras	4	23.4	18.4	-5.1	-22%	7.9	7.0	220.1	254.2
847149: Computers	4	0.1	0.2	0.1	42%	14.5	-0.3	377.1	2.6

\* HTS code changes during the reference period means changes may reflect data unavailability as opposed to changes in trade levels.

## Appendix 5: Key Sector Codes and Full HTS Code Descriptions

### Key Sector List

Code	Description	Code	Description	Code	Description
1	Pharmaceutical products	4	Electronics	7	Footwear
2	Health equipment	5	Food products	8	Rubber goods
3	Apparel	6	Furniture	na	None of the above

### Full HTS Code Descriptions for Referenced Products

HTS6: Full Description	Key Sector	HTS6: Full Description	Key Sector
090111: Coffee, Not Roasted, Not Decaffeinated	5	848330: Bearing Housings; Plain Shaft Bearings	na
151190: Palm Oil, Refined But Not Chemically Modified	5	848620: Machines For Man. Semiconductor Devices/elec Ic	na
151329: Palm Kernel Or Babassu Oil, Refined, Nt Chem Modfd	5	848690: Parts & Accesories For Mach To Man. Semicnt, Etc	na
160510: Crab, Prepared Or Preserved	5	850110: Electric Motors Of An Output Not Exceeding 37.5 W	4
160521: Shrimp & Prawns Prep/preserved Not Airtight Contrn	5	850300: Parts Of Electric Motors, Generators & Sets	4
180400: Cocoa Butter, Fat And Oil	5	850440: Static Converters; Adp Power Supplies	4
270900: Crude Oil From Petroleum And Bituminous Minerals	na	850650: Primary Cells And Batteries, Lithium	4
271019: Petrol Oil Bitum Mineral (nt Crud) Etc Nt Biodiesl	na	850990: Pts Electromech Domestic Appl Slf-cont Elect Motors	4
271129: Petroleum Gases Etc., In Gaseous State, Nesoi	na	851671: Electric Coffee Or Tea Makers	4
382319: Indust Monocarboxylic Fatty Acids, Nesoi Acid Oils	na	851761: Base Stations	4
390761: Poly(ethylene Terephthalate, Visc 78ml/g Or More	na	851762: Mach For Recp/convr/trans/regn Of Voice/image/data	4
390769: Poly(wthylene Terephthalate, Nesoi	na	851822: Multiple Loudspeakers, Mounted In Same Enclosure	4
391910: Plates, Sheet Etc Plast, S-adh, Rolls Nov 20 Cm W	na	852351: Solid-state Non-vol Semiconductor Storage Devices	4
392010: Plates, Sheets Etc, Non-cell Etc, Polymer	na	852580: Television Camera, Digitl Camra & Vid Cam Recorder	4
392051: Plate Etc, Noncel Etc, No Rein, Polymeth Methacryl	na	852691: Radio Navigational Aid Apparatus	4
392062: Plates Etc, Noncell Etc, Polyethylene Terephthlate	na	852721: Radiobroadcast Receivers For Motor Vehicles W Rcos	4
392113: Plates, Sheets Etc. Nesoi, Cellular Polyurethanes	na	852872: Reception Apparatus For Television, Color, Nesoi	4
400122: Technically Specified Natural Rubber (tsnr)	8	853222: Aluminum Electrolytic Fixed Capacitors	4
401110: New Pneumatic Tires Of Rubber, For Motor Cars	8	853649: Relays For Voltage Over 60v More But Nt Over 1000v	4
401120: New Pneumatic Tires Of Rubber, For Buses Or Trucks	8	853650: Elect Switches F Voltage Not Over 1000 V, Nesoi	4
401519: Gloves, Except Surgical Etc, Vulcan Rubber, Nesoi	2	853710: Controls Etc W Elect Appr F Elect Cont Nov 1000 V	4
420221: Handbags Surface Of Leather Or Composition Leather	na	853890: Pt F Elect Appr F Elect Cirt; F Elct Contrl Nesoi	4
420291: Containers, Bags, Cases Etc Of Leather/comp Nesoi	na	853941: Arc Lamps	4
420292: Container Bags, Cases Etc Nesoi, Plast/text Mater	na	854129: Transistors, Other Than Photosensitive, Nesoi	4
441231: Plywood Exc Bamboo, Ea Ply Lt=6mm Thk, Tropic Wood	na	854140: Photosnsitve Semicndctr Dvice Inc Phtvltc Cell Etc	4
441232: Plywood Exc Bamboo Lt=6 mm Thk Nonconiferous Nesoi	na	854190: Parts For Diodes, Transistors & Smlr Semiconductrs	4
441233: Plywd/etc,nes,gt-1 Out Ply Noncnf Speces In Subhd	na	854231: Processors And Controllers, Electronic Integ Cirt	4
610462: W/g Trousers Overalls Breeches Shorts Cotton, Knit	3	854239: Electronic Integrated Circuits, Nesoi	4
611030: Sweaters, Pullovers Etc, Knit Etc, Manmade Fibers	3	854370: Elec Mach And App, Having Indiv Functions, Nesoi	4
620331: M/b Suit-type Jackets And Blazers Of Wool, Nt Knit	3	854390: Pt Elec Mach & Appr W Individual Functions, Nesoi	4
620462: Women's Or Girls' Trousers Etc Not Knit, Cotton	3	854411: Insulated Winding Wire Of Copper	4
620520: Men's Or Boys' Shirts, Not Knit, Of Cotton	3	854449: Insulated Electric Conductors =&t; 80 V Nesoi	4
620640: W/g Blouses, Shirts & Shirt Blouses mmf, Not Knit	3	854470: Insulated Optical Fiber Cables With Indvuly Sh Fbr	4
630790: Made-up Textile Articles, Nesoi	2	860719: Truck Axles And Wheels & Pts, Etc For Rail Vehicles	na
640391: Footwear, Out Sole Rub Etc & Up Lea Nesoi, Ank Cov	7	870191: Tractors, Not Exceeding 18kw	na
640411: Footwear Tex Up Rubplas Sol Sport Shoes	7	870192: Tractors, Exceeding 18 Kw But Not Exceeding 37 Kw	na
711319: Jewelry And Parts Thereof, Of Oth Precious Metal	na	870194: Tractors Exceeding 75 Kw But Not Exceeding 130 Kw	na
721891: Smfnshed Prdcts, stainless Steel, rectngulr (nt Sqr)	na	870321: Pass Mtr Veh, Spark Ign Eng, Not Ov 1,000 cc	na
730820: Towers And Lattice Masts Of Iron Or Steel	na	880330: Parts Of Airplanes Or Helicopters, Nesoi	na
730890: Structures And Parts Nesoi Of Iron Or Steel	na	901890: Instr & Appl F Medical Surgical Dental Vet, Nesoi	2
760612: Aluminum Alloy Rect Plates Etc, Over .2 mm Thick	na	902920: Speedometers And Tachometers; Stroboscopes	na
842139: Filter/purify Machine & Apparatus For Gases Nesoi	na	903040: Oth Inst, Specially Designed For Telecommunication	na
843149: Parts And Attachments Nesoi For Derricks Etc.	na	903082: Inst To Check Semiconduct Wafers &such That Record	na
844399: Pts & Acc Of Printers, Copiers And Fax Mach, Nesoi	4	903180: Meas & Checkng Instrument, Appliances & Mach Nesoi	na
846729: Tools For Wk In Hand,w/ Self-cont Elec Motor,neso	na	903210: Thermostats	na
847149: Digital Adp Mac & Units,entered As Systems, Nesoi	4	940161: Seats W Wooden Frames, Upholstered, Nesoi	6
847170: Automatic Data Processing Storage Units, N.E.S.O.I	4	940320: Metal Furniture Nesoi	6
847330: Parts & Accessories For Adp Machines & Units	4	940340: Wooden Kitchen Furniture, Except Seats	6
847990: Pts Of Mach/mechncl Appl W Indvul Function Nesoi	na	940350: Wooden Bedroom Furniture, Except Seats	6
848190: Pts F Taps Etc F Pipe Vat Inc Press & Thermo Contrl	na	940360: Wooden Furniture, Nesoi	6
848210: Ball Bearings	na	940421: Mattress Of Cellular Rubber Or Plastics	6