

Summary of the US and EU tariffs that apply to market pulp

12 May 2025

1. US tariffs on market pulp

On 1 March: the US has started a national security investigation against imports of “*timber, lumber and their derivative products*” (including pulp and paper). At the present time (22 April), the investigation is on-going. The primary target of this investigation is lumber, that is an important material for the housing in the US. Any article which is considered as key to the US security will have its own tariff.

On 4 March: the US applies tariffs of 20% on all imports from **China**. After an escalation between the two countries, the rate is at the present time of 145% (except for smartphones, computers etc.) The same rate is applied by China on US imports. This rate of 145% applies to pulp and paper products.

On 3 April: the US applies tariffs of 20% on all imports from **Canada and Mexico**, except for goods covered by the regional trade agreement. Pulp is mentioned in this trade agreement. At the present time, there are consequently no tariffs between the USA and Canada on pulp.

On 5 April: the US applies tariffs of 10% on all imports from **all trading countries**.

On 9 April: the US applies “reciprocal tariffs” on all imports from **all trading countries (including EU, Brazil etc.)**. Different rates are considered, but the rate is 20% for pulp and paper from the EU countries.

On 9 April: the US decides a 90-day pause on the “reciprocal tariffs”.

Consequently, **at the present time:**

- **Pulp and paper products imported by the USA from the EU have a tariff of 10%.**
- **At the end of the 90-day (9 July), the tariff will become 20%.**

On 12 May, top U.S. officials said that America and China will both substantially cut reciprocal tariffs targeting each other. The announcement goes some way toward deescalating U.S. tariff war. The U.S. will cut tariffs on Chinese imports from 145 percent to 30 percent, while the Chinese side will drop measures from 125 percent to 10 percent.

2. EU tariffs on market pulp

On 14 April: the European Commission unveiled a set of “rebalancing measures” via regulation 2025/778. This regulation plans to implement a 25% tariff on **mechanical pulp** (no other pulp grades are mentioned) as of 16 May.

On 14 April: the European Commission unveiled a regulation (2025/786) suspending until the **14 July** the duties on US goods.

On 8 May, the European Commission upped the pressure in the trade conflict by proposing a list of US goods (worth nearly €95 billion of trade) for potential retaliatory measures. No tariff is mentioned yet. The list is put to **consultation until 10 June. This list is additional to the one set on 14 April.**

This **draft list of US goods includes many pulp grades:**

- thermo-mechanical wood pulp, not chemically treated (47010010)
- dissolving pulp (47020000)
- **unbleached coniferous** chemical wood pulp, soda or **sulphate** (excl. dissolving grades) (47031100)
- **unbleached non-coniferous chemical** wood pulp, soda or **sulphate** (excl. dissolving grades) (47031900)
- semi-bleached or **bleached coniferous** chemical wood pulp, soda or **sulphate** (excl. dissolving grades) (47032100)

NB:

- sulphite pulp is excluded (CN 4704)
- fluff pulp is included: under CN code 47032100 (It is estimated that 75-95% of US imports consist of fluff pulp)
- Pulps of fibres derived from recovered (waste and scrap) paper or paperboard or of other fibrous cellulosic material (CN 4706) are excluded

The EU list **includes almost all paper & board grades.**

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