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POLICY BRIEF

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U.S. Reciprocal Tariffs: Implications for Bangladesh

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Abstract: This policy brief examines the impact of the newly imposed U.S. reciprocal tariffs on Bangladesh. The analysis highlights how the tariffs, though appearing to confer a relative advantage over competitors such as India and China, have raised absolute duty levels to such an extent that U.S. import demand is likely to be significantly depressed and profit margins for suppliers could be severely constrained. Simulation results deriving from a computable general equilibrium framework, known as the GTAP model, show U.S. apparel import demand to fall by 12 per cent or approximately $10 billion. The resultant impact on Bangladesh's apparel exports to the United States is a decline by 14 per cent or equivalent to above $1.0 billion. Rival suppliers also experience sharp export contractions. Exports prospects in other markets are also affected with the gains in the European Union being modest and accompanied by downward pressure on prices. This policy brief argues that reciprocal tariffs intensify the urgency for reform to strengthen external competitiveness, secure durable access through trade agreements, and promote product and market diversification, and these measures need to be integrated into a coherent LDC graduation strategy aimed at sustaining export growth and building resilience against external shocks.

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I. Background

In a marked departure from the traditional multilateral trade policy approach, the United States has introduced the so-called reciprocal tariffs targeting different countries with varying tariff levels, in conflict with the Most Favoured Nation (MFN) principle of the World Trade Organization (WTO). The policy grew out of the argument in Washington that America's trading partners were not giving U.S. firms a fair market access, and the persistence of large trade deficits was pointed to as proof of this unfairness. Tariff surcharges, in addition to existing MFN tariffs, are thus explicitly country-specific and are calibrated according to the size of the bilateral deficit. The reciprocal tariffs, typically ranging from 10 per cent to as high as 50 per cent, are unprecedented not only because of their broad application but also because of their magnitude. It has been estimated that the U.S. average effective tariff rate has now settled around 20 per cent (The Budget Lab, 2025; Reuters, 2025), representing a sharp rise from the pre-tariff period when average effective rates were closer to 2–3 per cent.

For Bangladesh, the United States is the single largest export market, accounting for about 18 per cent of its exports. Almost 90 per cent of the U.S.-bound exports are in apparel or readymade garments (RMG). Unlike in many other important export destinations where Bangladesh has enjoyed duty free market access, Bangladeshi apparel exports to the U.S. prior to the reciprocal tariff regime faced MFN duties on average more than 15 per cent. That is, while the average (MFN) tariff on apparel was already at a much higher than the overall average MFN tariff for industrial goods, the new reciprocal tariff structure would push the rates at a much higher level. In relative terms, this still appears advantageous compared with India, where tariffs reach 50 per cent, or China, where they are set at 30 per cent. Yet the absolute tariff burden for Bangladesh has increased sharply, which has implications for export market impact given the rising prices for consumers, price competitiveness, profit margins, and the sustainability of export growth.

The purpose of this policy brief is to assess how the newly imposed reciprocal tariffs are likely to affect Bangladesh's exports. It considers the scale of tariff incidence on export items, how higher duties may influence demand in the U.S. market, and the implications for Bangladesh when compared with other major apparel suppliers that also face higher tariffs. The analysis draws on ex-ante simulation using a global computable general equilibrium framework, commonly referred to as the GTAP model. On the basis of these findings, the brief highlights broad policy directions that could help Bangladesh address the immediate disruptions while laying the groundwork for longer-term adjustment.

II. Transmission of U.S. Tariff Effects

Consumer prices and tariff pass-through: One of the critical most points of transmission of U.S. reciprocal tariffs is set to be at the level of consumer prices in the United States. When tariffs are imposed, they act in effect as a tax on imported goods, raising the landed cost. That is, tariffs are collected at the border, but their bite is ultimately felt along the chain. Faced with higher duties, importers try to push forward some of it to retailers and consumers, while some is pushed back onto foreign suppliers through tougher purchasing terms. The literature generally finds that tariff pass-through is high at the import stage, then becomes progressively diluted as goods move through wholesale and retail, where contracts, mark-ups, and competition could mute the final price rise. In short, shoppers tend to pay more, but not always by the full amount implied at the border, and not all products move the same way.

Exporters may try to absorb part of this cost in order to stay competitive, but empirical studies of past episodes generally suggest that only a fraction can be borne by them. This behaviour, often described as pricing-to-market, helps preserve orders in the short run but erodes profitability and working capital. Evidence from earlier rounds of trade disputes indicates that tariff pass-through is usually incomplete: while consumers do face higher retail prices, exporters' margins are also squeezed as they shoulder part of the tariff burden. The reasonable magnitudes reported in the literature vary, with pass-through rates often found to lie somewhere between half and full transmission, though the exact figure depends on product characteristics, market power, and the structure of supply chains. Smaller firms, with less negotiating leverage and tighter finances, are generally more exposed than larger suppliers with diversified customers and product lines.

In industries such as apparel, exporters already operate on very narrow margins. This makes it unrealistic to expect them to absorb tariff hikes of around twenty per cent without severe strain. In practice, most of the additional cost cannot be borne by the producers; instead, a substantial portion is likely to be passed on to U.S. importers, retailers, and ultimately consumers, reinforcing the wider impact of the tariffs on market behaviour.

The U.S. market is likely to shrink: As tariffs push up consumer prices, willingness to buy will almost certainly diminish. The uncertainty over how long these duties will remain in place further discourages advance orders. In response, some buyers switch to domestic substitutes or source from countries not facing higher tariffs, while others cut back on product ranges, delay new launches, or opt for lower-quality alternatives. All of these responses point in the same direction: the overall market contracts. Production runs become shorter, inventories thinner, and both buyers and sellers adopt a cautious stance that makes the U.S. market less dynamic than before.

Competitive reshuffling among suppliers: Because reciprocal tariffs vary by country, relative positions shift. Suppliers facing the steepest penalties find it harder to hold shelf space, while those with smaller add-ons may gain orders, at least temporarily. Yet even the so-called winners meet tougher terms from buyers who use the new landscape to push for lower quotes, stricter delivery windows, and tighter compliance. Since overall demand is falling, improvements in market share may not translate into higher export earnings.

Supply-chain adjustments: Importers experiment with alternative sourcing, near-shoring certain lines, whenever possible, or splitting orders across more factories, possibly in different countries, to hedge policy risk. These adjustments are costly and slow to reverse; they create friction for quality control and logistics, and they reward vendors that can guarantee standards, documentation, and on-time delivery under tighter lead times.

Spillovers to third markets: A smaller U.S. market does not eliminate the underlying supply capacity. Unsold volume seeks outlets elsewhere. This diverts goods toward the European Union and other major destinations, intensifying competition, crowding product segments, and putting downward pressure on offer prices. Even where orders hold, suppliers may concede on price to defend volumes, leading to thinner margins across markets rather than only in the United States.

Longer-term behaviour: Persistent policy uncertainty reduces incentives to invest in upgrading, design, and compliance, yet it also nudges firms that stay the course to move up the value chain, differentiate more, and tighten operations. Governments, for their part, confront a familiar trade-off: short-term relief versus structural measures that lower costs, improve logistics, and strengthen credibility with buyers.

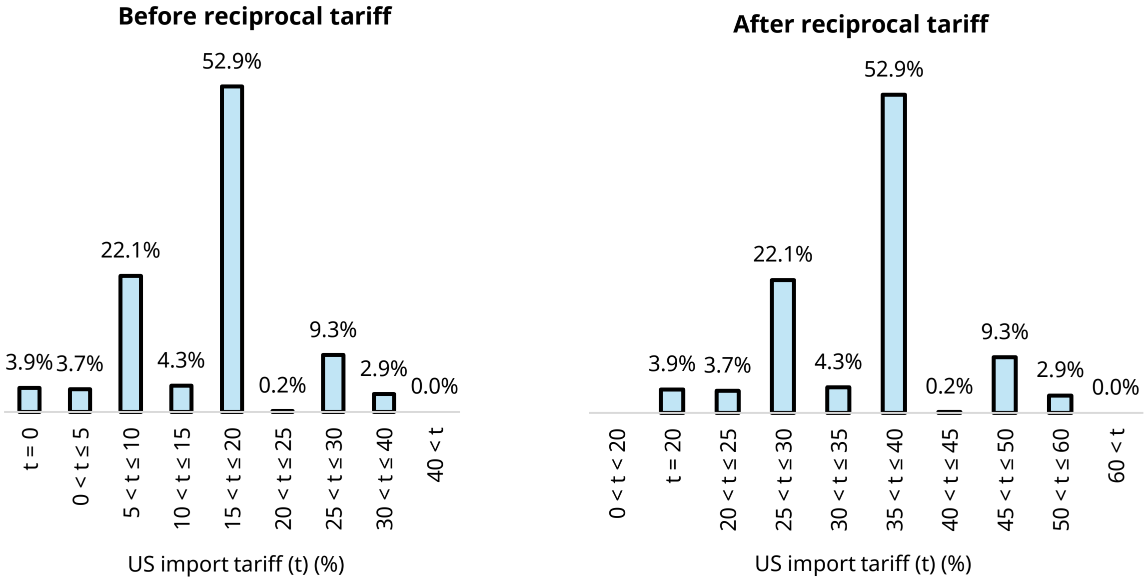
III. Extent of Tariff Incidence

After extended rounds of negotiation, a number of countries were able to secure reductions from the initially announced reciprocal tariff rates. For Bangladesh, the rate has been lowered from 35 per cent to 20 per cent. Other major suppliers of apparel products have also seen adjustments, with Vietnam and Sri Lanka now facing tariff rates of 20 per cent, and Cambodia and Pakistan a slightly lower rate of 19 per cent. In contrast, India, even after a protracted discussion, still faces one of the steepest surcharges, at 50 per cent, while the corresponding rate applicable to China is 30 per cent pending the conclusion of its ongoing negotiation. These divergences highlight the uneven bargaining results, potentially reshaping competitive positions of different countries in the U.S. market. Overall, Bangladesh's relative competitiveness is affected, with the new tariff structure depressing demand and limiting the ability of exporters to respond effectively.

For Bangladesh, however, even the reduced rate (from previously imposed 35 per cent to 20 per cent) translates into a heavy burden once it is applied across actual product lines, many of which were already subject to high tariff of 15 per cent or higher (see Figure 1).

- Prior to reciprocal tariffs, 4 per cent of Bangladesh's exports entered the U.S. duty-free. Under the new regime, these will be subject to a 20 per cent tariff.
- More than half of (53 per cent) of BGD exports previously faced tariffs of 15–20 per cent. These rates will now escalate to 35 per cent to 40 per cent.
- Before reciprocal tariff, over 12 per cent of Bangladesh's exports were subject to tariffs of above 25 per cent. These items will now be hit with a tariff rate in the range 45—60 per cent.

Figure 1: Share of Bangladesh's exports (%) in total exports to the US market by tariff category, 2024



Source: Authors' representation using the data from the USITC and WITS database

Such levels are exceptionally high in the context of global trade, where even a 5 or 10 per cent duty is often enough to prompt declining demand and altering sourcing decisions. These high tariffs across a broad spectrum of products will almost certainly be translated into higher prices at the retail level to depress demand. Any attempt by exporters to internalise a portion of the tariff will tend to undermine their supply response, limiting their capacity to expand or even maintain shipments. Particularly, for Bangladesh's apparel industry it has been shown that profit margins for producers are quite low in the single digit level (Razzaque et al., 2023). Overall, Bangladesh's relative competitiveness is clearly impacted by these tariffs, as the higher absolute rates overshadow any perceived advantage over rivals and reduce the scope for sustaining export growth.

Certain prominent apparel items with Bangladesh's exports to the US being more than US$ 100 million are particularly exposed to very high with tariffs (see Table 1).

- The largest two Bangladeshi export items, men's/boys' trousers (HS 62034245) and women's/girls' trousers (HS 62046280), with export receipts of about $1.5 billion and $750 million, respectively, in 2024, now confront duties rising from 16.5 to 36.5 percent.
- For example, HS 62034390 (Men's/boys' trousers, non-knit, synthetic fibres) with export value of about $260 million in 2024 will see its duty rate rise from about 27.9 per cent to 47.9 per cent.
- HS 61103030 (Sweaters & pullovers, manmade fibres, knit), with export shipments worth over US$165 million, now faces a tariff jump from around 32 per cent to close to 52 per cent.
- Another case is HS 62053020 (Men's/boys' shirts, not knit, manmade fibres), with export value of US$105 million faces a tariff hike from 26.9 per cent to 46.9 per cent. in the 20–25 per cent range, but under the new regime has seen them climb to almost 50 per cent.

These specific examples illustrate the severity of the tariff escalation and underscore why it is unrealistic to expect exporters to absorb such increases. For exporters already working on slim margins, the prospect of absorbing any substantial part of this increase is implausible. The more likely outcome is that U.S. importers, retailers, and consumers will shoulder much of the additional cost. Yet even if the burden is shared, the elevated tariffs are set to reduce demand, squeeze suppliers, and depress investment in future capacity.

Table 1: Bangladesh's selected apparel export items in the US market with high tariff rates

Product HS Code	Description	Export Value (Million USD)	Share of Total Export	Import duty (before reciprocal tariff) %	Import duty (after reciprocal tariff) (%)
62034245	Men's/boys' trousers & shorts, not bibs, not knit/crochet, cotton	1,481.91	16.89%	16.6	36.6
62046280	Women's or girls' trousers, breeches and shorts, not knitted or crocheted, of cotton,	731.09	8.33%	16.6	36.6
61091000	T-shirts, singlets, tank tops, and similar garments, knitted or crocheted, of cotton	536.38	6.11%	16.6	36.6
62034390	Men's/boys' trousers, not knit, synthetic fibres	258.63	2.95%	27.9	47.9
61103030	Sweaters & pullovers, manmade fibers, knit	165.93	1.89%	32	52
62053020	Men's/boys' shirts, not knit, manmade fibres	105.14	1.20%	26.95	46.95
61034315	Men's/boys' trousers, knit, synthetic fibers	67.77	0.77%	28.2	48.2
62046390	Women's/girls' trousers, not knit, synthetic fibres	63.09	0.72%	28.6	48.6
62046928	Women's/girls' trousers, not knit, artificial fibres	36.32	0.41%	28.6	48.6
61052020	Men's/boys' shirts, knit, manmade fibers	35.82	0.41%	32	52
61046320	Women's/girls' trousers, knit, synthetic fibres	35.73	0.41%	28.2	48.2
62064030	Women's/girls' blouses, not knit, manmade fibers	35.18	0.40%	26.9	46.9
62014075	Men's/boys' jackets & windbreakers, not knit, manmade fibres	35.16	0.40%	27.7	47.7

Source: Authors' analysis using the data from USITC and WITS database

IV. Impact of U.S. Reciprocal Tariffs: Simulation Results

In order to understand the implications of U.S. reciprocal tariffs, it is important to consider not only the duties that have been imposed on Bangladesh but also on all other global economies. This is because global markets and supplies are interlinked and tariffs levied on one country or a group of countries reverberate through other suppliers and markets. For example, when India and China face steeper tariffs, their exports to the United States could fall at a greater extent than from other countries, which in turn reshapes sourcing patterns and consumer choices. The knock-on effects extend further as their products become less competitive in the U.S., they often seek alternative outlets, increasing supply in other destinations. Furthermore, as the U.S. market shrinks due to much higher reciprocal tariffs, all suppliers will aim to export more in other markets thereby intensifying competition in third markets such as the European Union, depressing prices and squeezing margins for all suppliers. In this way, a tariff aimed at altering bilateral trade flows with the U.S. can inadvertently distort the competitive landscape far beyond its borders. To capture these linkages properly, a global general equilibrium framework is essential.

The Global Trade Analysis Project (GTAP) model is arguably the most suitable and widely used computable general equilibrium (CGE) tool for undertaking such analysis related to trade policy shocks. It is a multi-country and multi-sector general equilibrium modelling workhorse, covering 160 economies and 65 production sectors in the latest GTAP 11 database. What makes GTAP particularly valuable is its ability to link production, trade, and consumption across borders in a consistent framework with the modelling environment incorporating an inherent database for under the simulation exercises mimicking the policy changes or scenarios. The model integrates tariffs, production technologies, consumer demand systems, and trade flows, allowing one to simulate counterfactual scenarios such as the introduction of reciprocal tariffs. In practice, this means it is possible to examine not only the direct effect of U.S. tariffs on Bangladesh's exports but also how global prices, substitution effects, and income changes ripple across other suppliers and markets. With over two decades of refinement and an extensive academic community, GTAP remains the standard toolkit for applied international trade modelling.

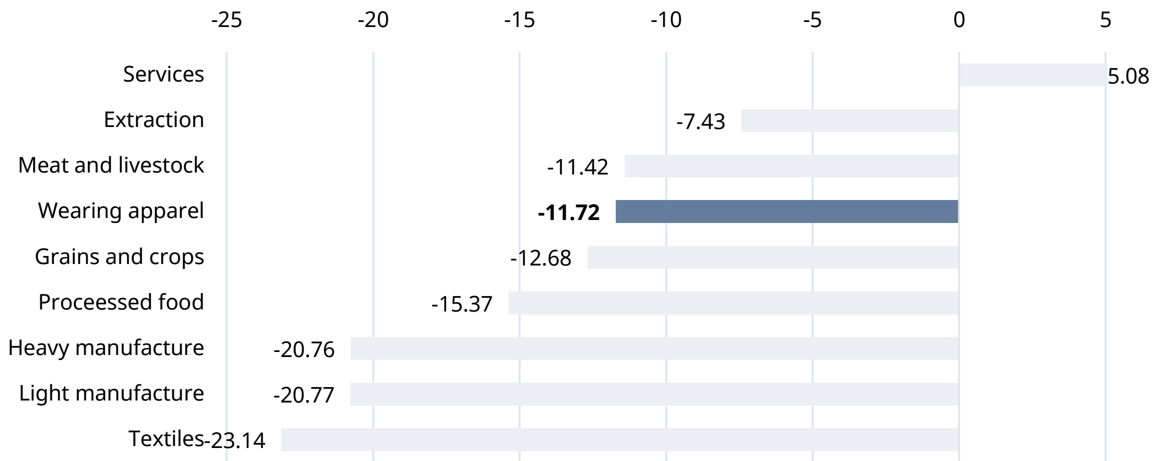
For this exercise, the full GTAP database has been aggregated into a more manageable set of countries (also known as regions in GTAP language) and sectors to focus on the relevant trade flows. For country or regional aggregation, countries which face higher tariffs than the baseline 10 per cent has been taken separately along with a group of "the rest of the world", giving a total of 45 regions. On the sectoral side, aggregation is done around 9 sectors with apparel and textiles are distinguished explicitly given their centrality for Bangladesh. A four-factor aggregation of skilled workers, unskilled workers, capital and land is considered. Overall, the applied aggregations of regions, sectors, and factors strike a balance in simplifying the analysis to highlight the channels that are most important for Bangladesh, while retaining enough global coverage to capture indirect effects from trade diversion and shifting demand affecting individual regions considered.

- The model simulations suggest that the introduction of reciprocal tariffs will sharply curtail U.S. imports by 18 per cent and exports by 14 per cent. This is what is expected given that one direct consequence of high tariffs is reduced import demand. U.S. exports fall as protected domestic market reallocates resources in favour of the import competing sectors affecting the production of exportable. For countries such as China and India, which face steep tariff surcharges in the U.S. market, their overall exports (i.e., total exports including U.S. bound shipments) decline by around 2.7 and 2.5 per cent, respectively. By contrast, Bangladesh registers a much smaller contraction of less than one per cent. Other countries such as Vietnam, Cambodia, and Pakistan see their overall exports facing fractional declines in the range falling by 0.34—0.67 per cent. On the import side, China and India face significant declines of just about 5 and 3.5 per cent, respectively. For Bangladesh, the corresponding decline is 0.21 percent with Cambodia, Pakistan Vietnam—all experiencing a marginal fall.

One of the most striking simulation results is that the U.S. apparel market shrinks by about 12 per cent. This contraction translates into roughly a $10 billion reduction in market size (Figure 2).

- The reduced size of the U.S. apparel market means the simulations project Bangladesh's exports to the United States will decline by around 14 per cent, equivalent to approximately $1.25 billion, with apparel alone accounting for $1.08 billion of this drop. Pakistan, Cambodia, and Sri Lanka also register export losses in the same market in the range of 10–14 per cent. By contrast, Indonesia and Vietnam are anticipated to experience much steeper declines of 27–28 per cent. Given the very high tariff rates on India and China, their exports are found to contract by close to 50 per cent and 60 per cent, respectively.
- The simulation results clearly demonstrate that, despite Bangladesh enjoying a relative advantage over India and China, its exports to the United States also fall in absolute terms. This is because the sharp tariff hikes raise consumer prices and suppress overall demand. Gains in market share are therefore offset by the shrinking size of the market.
- The simulations further indicate that Bangladesh's apparel exports to the EU increase modestly, by about 2 per cent. However, this expansion is accompanied by downward pressure on prices, largely due to increased supplies from rival exporters. Export prospects are also adversely affected in other destinations such as India, Japan, the Republic of Korea, and China. Overall, the impact of reciprocal tariffs is contractionary for global trade and corrosive to Bangladesh's immediate export prospects in the United States.

Figure 2: Impact on the USA's overall imports by sectors (% deviation from the baseline)



Source: Authors' analysis using GTAP model

Figure 3: Impact on exports to the USA market (% deviation from the baseline)

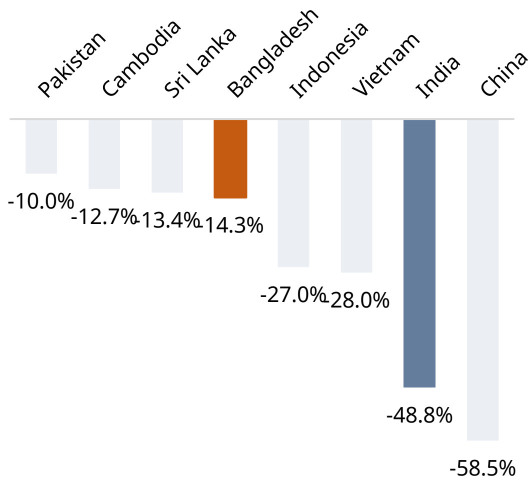
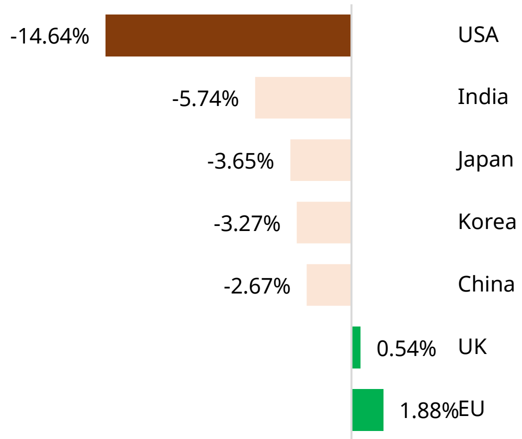


Figure 4: Impact on Bangladesh's apparel exports to its top destination markets (% deviation from the baseline)



Source: Authors' analysis using GTAP model

At the macro level, the model indicates the impact on Bangladesh's GDP is negligible, which can be explained by the fact that export loss is relatively small and the size of exports in Bangladesh's GDP is quite small.

A simulation was carried out to assess the impact if India is able to reduce its tariff level to that of Bangladesh's as further U.S.-India negotiations are currently underway. Results show that in that case, Bangladesh apparel export decline in the U.S. would deepen further from the current level of just over 14 per cent to about 17.5 per cent. On the other hand, such a successful negotiation will result in a India's apparel exports falling to just by 18 per cent from a much worse situation of 82 per cent when the reciprocal tariff is 50 per cent.

V. Policy Recommendations

The tariff incidence analysis and simulation results make it clear that Bangladesh cannot afford to treat the U.S. reciprocal tariffs as a passing episode. Imposition of higher tariffs coincides with impending LDC graduation, which would lead to erosion of trade preferences that Bangladesh has enjoyed for several decades now and thereby causing a twin pressure point that requires an integrated response. Several policy directions emerge from that context.

Short-term cushioning measures: In the immediate term, there is a need for cushioning measures for firms most exposed to the U.S. market. Many of these exporters operate on wafer-thin margins and sudden tariff hikes can trigger liquidity crises or discourage them from fulfilling orders. Temporary credit support, export refinancing facilities, or even targeted marketing assistance could help viable firms remain afloat during the adjustment. Such measures are not a substitute for structural reforms, but they can ease the pain of sudden shocks and prevent an erosion of productive capacity.

Market diversification: A second strand of response must focus on diversifying markets. The simulations show that even when Bangladesh gains relative advantage over India or China, the overall size of the U.S. market contracts, leaving little room for expanding export earnings. This underlines the importance of expanding footholds elsewhere. Securing GSP+ in the European Union, negotiating improved access in Japan and Canada, and deepening engagement with regional partners are not abstract diplomatic goals; they are practical necessities to offset the contraction in the American market.

Product diversification and upgrading: Market diversification, however, is only half the story. Bangladesh also needs product diversification and upgrading. Reliance on low-end cotton T-shirts and trousers has served the economy well, but these items are precisely the ones now facing punitive tariffs. Moving into higher-value segments, synthetic-based products, and even non-apparel lines could reduce vulnerability to sector-specific shocks. This requires a policy environment that encourages innovation, investment in design, and technology adoption at the firm level. The anticipated reduced exports of apparel from China can also provide an opportunity for moving up the value chain.

Strategic trade negotiations: Alongside this, trade negotiations must be approached strategically. Bangladesh is currently engaged in a trade negotiation with Japan and discussions are underway to explore an option for joining RCEP. These are significant initiatives and breakthroughs in these cases will not only secure market access on a lasting basis in some of the world's most dynamic economies but also help attract foreign investment and integrate into supply chains involving the East Asian regions. Entering these talks from a position of weakness, with a still highly protective tariff regime at home, could prove to be a difficult option in securing free trade agreements that can ensure welfare gains (Razzaque et al. 2025). Rationalising the tariff structure is therefore not simply a matter of compliance with best practice but about creating the policy space for negotiating credible trade agreements that genuinely expand market access. As mentioned above, securing GSP+ with a provision duty-free market access apparel exports should be considered as one of the topmost priorities for Bangladesh.

Competitiveness reforms: Competitiveness reforms at home are equally crucial. Tariff shocks cannot be entirely neutralised by diplomacy alone. Exporters need more reliable energy supplies, lower logistics costs, faster port clearances, and credible compliance with international sustainability standards if they are to maintain margins in a tighter global environment. These are long-standing bottlenecks that reciprocal tariffs merely magnify, making reform not just desirable but urgent. Rationalisation of Bangladesh's own protective tariffs to reduce anti-export bias can improve relative incentive structure of the export sector and prepare ground for meaningful FTAs.

Longer-term resilience: The issue of long-term resilience and competitiveness building is critical for dealing with external shocks in promoting exports. As it is mentioned in the Smooth Transition Strategy (STS), the significance of investing in skills development, promoting technology adoption across industries, and nurturing industrial policies that raise productivity cannot be overemphasised (Government of Bangladesh, 2025). The logic is simple: firms that can produce more efficiently, adapt to changing consumer preferences, and differentiate their products are less exposed to sudden shifts in external trade policies. A stronger base of competitiveness will also give the country more room to manoeuvre in trade negotiations, reducing the vulnerability that comes from over-reliance on a narrow set of exports.

Integration with LDC graduation strategy: Finally, it is important to see all of these recommendations not in isolation but as part of the broader preparation for LDC graduation. Reciprocal tariffs are a disruptive external shock, but they overlap with the looming loss of unilateral preferences. Integrating short-term cushioning, medium-term market and product diversification, and long-term competitiveness reforms into a single graduation strategy will give Bangladesh a coherent pathway. The challenge is formidable, but delaying action will only raise the cost of adjustment later.

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