

MichAuto Tariff Update

Sept. 12, 2025

Cont.



President Trump signs two Executive Orders that reverse course on some of the tariffs imposed on imported vehicles and parts

The Trump Administration announces a 50% tariff on steel and aluminum imports, doubling the previous 25% rate

Apr. 9, 2025

May 28, 2025

Jul. 7, 2025

Apr. 29, 2025

Jun. 5, 2025

President Trump announces a 90-day pause on reciprocal tariffs, except for China

The Court of International Trade rules that the Trump Administration's use of the IEEPA to enact sweeping tariffs is illegal. The decision stayed as it moves to the Federal Appeals Court

President Trump signs an Executive Order delaying implementation of his proposed reciprocal tariffs, to Aug. 1

Cont.

The U.S. Federal appeals Court affirms that President Trump lacks the authority under IEEPA to unilaterally impose tariffs

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Aug. 1, 2025

Sept. 10, 2025

Aug. 29, 2025

The Trump Administration's Aug. 1 deadline for new trade deals passes having reached new agreements with a number of important countries including Japan, South Korea, and Vietnam, as well as the EU

The Supreme Court on Tuesday agreed to decide whether a 1977 federal law giving the president certain emergency powers allowed President Donald Trump to levy tariffs on nearly all goods imported into the United States

Tariff Disruption Across the Industry



- The inauguration of the second Trump Administration in January brought about the most aggressive new tariff rates in almost 100 years.
- A steep 25% tariff on most passenger vehicles and light trucks imported from outside North America.
- A pause on new tariffs on all USMCA-compliant goods remains in effect between the U.S., Mexico, and Canada. The agreement will officially reopen for renegotiations next year.
- Negotiations with China continue, with a current 30% baseline tariff in place.
- President Trump recently announced a 100% tariff on semiconductors made by companies whose operations are entirely based outside the U.S. and have no plans to move any operations to the U.S.
- Recent quarterly earnings reports indicate that revenues at the major OEMs are taking a hit as the cost of tariffs begins to eat into profits.