



New Tariffs and Supply Chain Challenges to Automotive, Trucking, and Electronic E-commerce Sectors

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As of August 2025, the U.S. government has announced a series of new “universal” reciprocal tariffs targeting a wide array of imported goods, including vehicle components, critical minerals, semiconductors, solar panels, and advanced batteries, primarily from China and other countries imposing similar trade barriers on U.S. exports. These actions are expected to continue affecting a broad range of supply chains across the automotive, trucking, and electronic e-commerce sectors within the United States.

For example, U.S. Customs and Border Protection has reported an increase in import inspections for automotive and trucking parts, while the Office of the U.S. Trade Representative has announced new tariffs on Chinese goods, including batteries and electronic components. Evolving export-control and customs regimes, including the recent tightening of controls on sensitive technologies under the Export Administration Regulations (EAR), are reshaping cross-border parts procurement. At the same time, ever-shifting tariff schedules – particularly those on steel, aluminum, and lithium-ion batteries – are compressing margins and complicating price-predictability. Logistical bottlenecks, labor shortages, and geopolitical flashpoints continue to add time, cost, and uncertainty to e-commerce fulfillment models premised on rapid delivery.

To navigate this landscape, companies should focus on tariff-engineering strategies – such as revisiting product classifications, leveraging preferential trade programs like the United States-Mexico-Canada Agreement (USMCA), and structuring pass-through pricing terms – to soften duty impact. Supply-chain resiliency, meanwhile, increasingly turns on diversifying sourcing beyond single regions, incorporating near-shore or friend-shore suppliers, and embedding contractual safeguards (e.g., indexed pricing, force-majeure language, and performance-based incentives) that distribute risk and preserve business continuity and profit margins.

Looking ahead, companies that combine operational agility with proactive tariff and supply-chain management stand the best chance of sustaining growth in this volatile environment. Practical next steps include conducting a tariff-exposure analysis linked to SKUs and country-of-origin data, and renegotiating key supplier and logistics agreements to embed flexibility on

lead times, inventory buffers, and alternative routing. By implementing these initiatives, companies position themselves to secure a durable competitive advantage and to prosper in the face of current challenges.

Additional Information

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