

THE CARMICHAEL C MPASS

"WHEN THE TIDES OF TRADE SHIFT, WE'RE YOUR COMPASS."

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President Trump Plans New Tariffs on Imports of Furniture, Heavy Trucks, and Pharmaceuticals

President Trump posted an announcement on Truth Social that he would impose new tariffs on imports of furniture, heavy trucks, and pharmaceuticals on October 1.

He will impose a 25% tariff on heavy trucks to protect the future of U.S. manufacturers. He will assess a 50% tariff on imported kitchen cabinets, bathroom vanities, and similar products. He will also set a 30% tariff on upholstered furniture due a "flooding" of these products into the United States.

In his post, he announced a 100% tariff on branded and patented pharmaceuticals unless a company is building their pharmaceutical manufacturing plant in America. The details have not been posted yet, but we will share them when they are issued.

FAQ Update States Annex II Reciprocal Exemptions Don't Apply to Mail

CBP, in an update to their [FAQ](#) on e-Commerce published on September 17, has advised that the Annex II Reciprocal Tariff Exemptions do not apply to shipments sent via international post. The only exemptions remaining for goods previously covered by de minimis includes goods covered under 50 U.S.C. 1702(b), bona fide gifts as defined in 19 C.F.R. 10.153(a), and mail flats which are documents and letters that do not contain merchandise.

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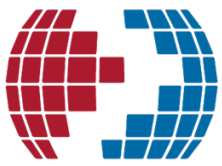
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U.S. Supreme Court Releases Schedule, IEEPA Cases to be Heard November 5

The U.S. Supreme Court released its upcoming schedule on September 18, 2025. This schedule indicates that oral arguments for the two cases regarding the legality of the IEEPA tariffs will be heard on November 5. The deadline for the filing of briefs for these cases is October 30.



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Mexican Government Also Opens 60-Day Public Consultation Window for USMCA

On September 17, 2025, the Mexican Minister of Economy opened a 60-day public consultation window inviting businesses, trade organizations, and other interested parties to submit comments ahead of the USMCA's six-year review which is scheduled for July of next year. The consultation window opened by Mexico will end on November 16, 2025.

This review, required by Article 34.7 of USMCA, allows the U.S., Mexico, and Canada to assess the effectiveness of the agreement and propose any changes that may be necessary.

As mentioned in our previous edition, the United States has also announced the beginning of their public consultation process. The Federal Register notice announcing the commencement of this process can be found [here](#).

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