

THE CARMICHAEL COMPASS

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

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Section 232 Duties Imposed on Imports of Certain Semiconductors

A [presidential proclamation](#) issued January 14, has imposed 25% tariffs upon imports of certain semiconductors and their derivative products beginning January 15. A [fact sheet](#) was also released.

In the proclamation, a 25% duty is implemented on imports of semiconductors classifiable under HTS headings 8471.50, 8471.80, 8473.30 that meet the following technical parameters: A total processing performance (TPP) greater than 14,000 and less than 17,500, and a total DRAM bandwidth greater than 4500 GB/s and less than 5,000 GB/s; or a TPP greater than 20,800 and less than 21,100, and total DRAM bandwidth greater than 5,800 GB/s and less than 6,200 GB/s. Exemptions are included for semiconductors that do not meet the technical parameters, as well as semiconductors that are for use in U.S. data centers, repairs or replacement in the U.S., research and development in the U.S., use by U.S. start-ups, use in non-data center consumer electronics, use in non-data center civil industrial applications, and use in U.S. public sector applications.

Customs also quickly released a [CSMS](#) message with guidance to the trade community on the implementation of these duties.

As part of this order, trade negotiations with countries that have the potential to strengthen the U.S. semiconductor industry will continue. These negotiations must be concluded within 180 days of the issuance of the proclamation. Additional duties accompanied by tariff offsets may be possible.

For full details of the new Section 232 duties, please visit the presidential proclamation, fact sheet, or [annex](#) to the order.

AGOA and Haiti HELP Pass House

A vote on January 12 in the House of Representatives regarding two bills to restore the African Growth and Opportunities Act and the Haiti HELP program have passed after seeing a large margin of support. This is just the

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Taiwan to Receive 15% All-In IEEPA Rate, Other Changes

The U.S. Commerce Department has announced in a [fact sheet](#) published January 15 that an agreement between the U.S. and Taiwan has been reached that will result in an all-in IEEPA Reciprocal rate of 15% for the East Asian

first step in restoring both trade programs which expired back in September of 2025.

[H.R. 6500](#), the bill that would restore AGOA, saw a vote of 340-54. [H.R. 6504](#), the bill that would restore Haiti HELP, saw a vote of 345-45.

Some recent updates to the language of these bills have reduced the renewal period down to a single year. The renewals have been attached to the spending package set to be voted on in the House of Representatives this week with the Senate expected to vote on the spending package before January 30. As these bills continue to progress, we will keep an eye out for any further developments.

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nation. Other promises include a Section 232 duty rate of no more than 15% for Taiwanese auto parts, timber, lumber, and wood derivative products; future Section 232 Semiconductor duties that reward Taiwanese producers that invest in the United States; and a 0% reciprocal tariff for generic pharmaceuticals, civil aircraft, and unavailable natural resources. As this situation develops and implementation information becomes available, we will provide updates.



Block on Ending IEEPA Emergencies for Reciprocal Tariffs Expiring in 10 Days

The procedure in place to block a vote on ending the emergencies that underlies IEEPA reciprocal, fentanyl, and Brazil tariffs are due to expire. The language for this procedure was added to a bill last year but has not been included in the spending package for this year. The House Rules Committee was meeting just before the recess begins this weekend on the insertion of the procedure again. This affects the spending bill and if it does not pass the recess may be cancelled or it could lead to partial government shutdown. We will have more information on Monday.

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