

BRIEFING

US Tariff Regime and EU - US tariff agreement

As of 7 August 2025, the United States has enacted wide-ranging tariff measures under a series of Executive Orders signed at the end of July. At the core of these measures is a new **reciprocal tariff regime**, which resets the way US import duties are calculated and has direct implications for global supply chains.

With respect to the EU, the political agreement reached between U.S. President Donald Trump and European Commission President Ursula von der Leyen at their meeting in Scotland on 27 July avoided a broader escalation but remains non-binding until confirmed through the necessary legal acts in both jurisdictions. (see also European Commission's [website](#)).

This briefing provides CLECAT members with an overview of the main features of the US tariff regime now in effect, the sectors most exposed, and the provisional exemptions under discussion. It also sets out considerations for forwarders in adapting operational practices and engaging with clients in light of the evolving legal framework.

For freight forwarders and their customers, these measures represent a shift in the trading environment, requiring close attention to documentation, classification, and compliance processes. The new framework is expected to bring a noticeable increase in workload. Accurate classification, origin verification, and transshipment controls will become even more critical, while routing choices and contractual arrangements may need to be revised at short notice. At the same time, clients are likely to turn to their logistics providers for scenario planning and cost assessments, placing freight forwarders in a key advisory role as supply chains adjust to the new tariff conditions.

Global Baseline: Reciprocal Tariffs

Effective 7 August 2025, the US applies a universal reciprocal tariff regime to all trading partners without preferential agreements. The mechanism works as follows:

- If a product's **MFN** (most-favoured-nation) **tariff is below 15%**, the U.S. tariff is raised to **15%**.
- If a product's **MFN tariff is above 15%**, that higher rate applies as normal.
- **Steel and aluminium remain subject to 50% tariffs** under Section 232, outside this formula.

Example: If a country exports a product to the US with an MFN rate of 5%, the new tariff becomes 15%. If the MFN rate is 20%, the tariff remains 20%.

This global framework marks a significant tightening of US trade policy, with immediate effects on customs processing, compliance, and supply chain planning. For countries without political agreements like the EU, the reciprocal tariff applies in full, reinforcing the importance of the EU–US deal even in its provisional state. Higher US tariff bands now apply to multiple partners (e.g., Brazil 5



0%, Canada 35%, Japan 25%, Vietnam 20%), reshaping sourcing competition and transit choices.

You can the official list of **adjusted reciprocal tariffs** per country as initially set in the Executive Order [here](#).

De minimis suspension - customs/parcels

On 30 July 2025, the White House issued an [executive proclamation](#) ending the \$800 de minimis threshold for non-postal imports into the United States. This measure, which takes effect on **29 August 2025**, applies to all foreign exporters, including those in the EU. From that date, all courier and express freight shipments to the U.S. will be treated as formal imports, requiring a full Automated Commercial Environment (ACE) customs entry with complete data, valuation, duties, taxes, and fees.

To ease the transition, U.S. Customs and Border Protection (CBP) will, for the first six months, apply flat duties of USD 80–200 per item. However, practical uncertainties remain significant. PostEurop has warned in a [statement](#) that postal operators will face major constraints until CBP finalises its operational guidance and systems are updated. Forwarders should therefore anticipate disruptions to postal channels and consider alternatives such as express integrator Delivered Duty Paid (DDP) solutions or formal customs entries via brokers.

Several European postal operators have already announced temporary suspensions. PostNord (Sweden/Denmark), Posten Bring (Norway), and Omniva (Baltics) have paused parcel shipments to the U.S. due to the short implementation timeline and lack of clarity. Bpost (Belgium) will suspend shipments as of 22 August 2025.

As of mid-August, only limited technical details have been released by CBP, leaving companies with little time to prepare. If critical issues around data collection, duty payment, and customs procedures are not resolved before 29 August, postal operators across Europe may be forced to restrict or suspend goods shipments to the U.S. in coordination with their national authorities.

To note the [Loadstar article](#) on UK and EU retailers warning that the ending of the U.S. de minimis regime could divert a surge of low-value Chinese imports into Europe.

EU–US Trade Deal

The **political agreement of 27 July 2025** between the EU and the U.S. was reached against the backdrop of new U.S. tariff measures under the “reciprocal tariff” regime.

For **EU-origin goods**, the US applies a conditional structure under the reciprocal tariff regime:

- where the **MFN duty rate** is **below 15%**, the tariff is increased to **15%**;
- where the **MFN duty rate** is **above 15%**, the MFN rate continues to apply with no additional layer.

Transitional arrangements apply to some shipments already in the supply chain. Goods that were **already on their final leg before 7 August 2025, 00:01 ET**, or **entered for consumption before 5 October 2025, 00:01 ET**, may be exempt from the new higher territory-specific tariffs. These exemptions **DO NOT** apply to the baseline 10% duty in place prior to the reciprocal regime.

This arrangement avoids the worst-case scenario but still raises landed costs for many EU products. Commissioner Maroš Šefčovič framed the deal as the best possible outcome under “very difficult circumstances,” emphasizing geopolitical stakes. ([POLITICO Europe](#)). In a recent call with European stakeholders, DG TRADE described the agreement as ‘stabilising’, providing EU exporters with greater predictability and buying time for negotiations on unresolved areas (notably pharmaceuticals, agri-food categories, and possible quota-based arrangements for steel and aluminium). You can find the slides on the agreement presented by DG TRADE [here](#).

The deal will still result in a meaningful increase in trade costs. European exporters such as automotive, machinery, wine, spirits, industrial goods face a new 15% tariff on most exports, curbing profits and competitiveness. (see also a detailed overview in [EU-US trade deal: The biggest losers and \(a few\) winners](#) – POLITICO Europe)

On 21 August the European Commission issued a [press statement](#) and a list of [questions and answers](#) on main elements of the trade deal. The document formalises the political handshake agreement and provides clarity on tariffs, market access, energy procurement, and regulatory cooperation. The US White House also issued a [statement](#) on the deal.

Key points include:

- **Tariff cap agreement:** U.S. will cap tariffs on European cars, pharmaceuticals, and semiconductors at **15%** (previous threat was 30%).
- **Autos:** U.S. to reduce tariffs on autos and parts from **27.5% to 15%**, conditional on EU eliminating tariffs on all U.S. industrial goods (EU currently applies 10% on cars).
- **Pharma:** Confirmation that European pharmaceuticals are included in the 15% cap, avoiding risk of being priced out of the U.S. market.
- **Agriculture:** EU to expand market access for **non-sensitive U.S. agri-food products**.
- **Exemptions:** U.S. exempts **aircraft and parts, cork, and generic drugs** from higher tariffs
- **Steel & aluminum:** EU–U.S. to cooperate on overproduction issues; will explore **tariff-rate quotas** to avoid EU exports facing a 50% tariff.
- **Critical minerals:** Joint commitment to counter export restrictions (e.g., from China).
- **Energy procurement:** EU to procure **\$750 billion U.S. energy** (LNG, oil, nuclear) through 2028.
- **AI chips:** EU to buy “at least” **\$40 billion U.S. AI chips**.

Also of interest is the Q&A on CBAM/CSDR and deforestation:

- **Is the EU committing to give better treatment to US exporters of CBAM goods?**

No. We have not committed to change CBAM in any specific way, nor to provide more favourable treatment to US companies under CBAM.

What we have agreed is to work to provide additional flexibilities in the implementation of CBAM for all companies, and especially for small and medium-sized companies. This is something the



Commission is already doing as part of its [simplification agenda](#) and in line with its commitment to further streamline EU legislation and improve its implementation.

- **The deal addresses the EU's Corporate Sustainability Due Diligence Directive (CSDDD) – what has the EU agreed to?**

We have agreed to exchange views with the US on CSDDD related issues. The guiding principle of our discussions with the US has been to ensure that the Directive does not result in an unnecessary administrative burden, especially for small and medium size companies. This is something that the Commission is committed to, as shown by our proposal to simplify the CSDDD currently with the Parliament and Council. This cooperation does not lead to any changes to EU domestic rules nor will we grant US companies more favourable treatment under this Regulation or any EU Regulation.

- **How does the deal address US concerns on the EU Deforestation Regulation (EUDR)?**

We have agreed to exchange views with the US on the EUDR. The US has been classified as a low-risk country and therefore a reliable partner from which EU importers can source their products deforestation free. Having a platform for discussing the implementation of the EUDR with the US will be valuable to ensuring that the EUDR does not result in unnecessary barriers to transatlantic trade.

What this means for freight forwarders and customs operations

The new US tariff regime significantly raises the compliance, operational, and contractual workload for forwarders and customs agents. Three main areas are affected:

1. Customs and Compliance

All non-postal parcels, regardless of value, now require formal ACE customs entries. Forwarders will need to expand filing capacity, improve data quality, and educate clients on new obligations.

Authorities are applying stricter checks on tariff classification and origin, especially for EU goods under the 15% reciprocity rule and for products in higher tariff bands (15–50%).

Transshipment monitoring has intensified: proven evasion cases trigger a 40% penalty tariff. This requires stronger due diligence, supplier attestations, and precise routing documentation. Even minor changes in production processes can alter origin status, so forwarders should proactively warn clients and keep written proof of advice to avoid liability disputes.

2. Transport and Routing

Tariff differentials are reshaping trade lanes globally (e.g. Brazil 50%, Canada 35%, Switzerland 39%). Re-routing, modal shifts, and near-port storage may become necessary. For high-exposure products, strategies such as split shipments, bonded warehousing, and alternative consolidation methods can help balance duty incidence and cash-flow pressures.

3. Contracts, Pricing and Liability

Given the policy volatility, contracts should be updated to allocate risks clearly. This includes tariff pass-through clauses, liability definitions for misdeclaration or origin disputes, and flexible provisions allowing routing or modal changes. Forwarders should document all client advisories in writing to protect against downstream liability claims.

Operational recommendations / checklist

1. Client advisories

- Closely monitor updates on official US Customs websites, as press coverage is often misaligned with actual operational and administrative announcements — both in content and timelines.
- Explain the EU 15% rule, steel/aluminium 50%, and 29 August de minimis cut-over; share SKU-level impact tables.
- Support clients in developing contingency plans to address potential tariff reversals or further policy changes

2. Customs process updates

- Ensure ACE capacity, data completeness, and valuation/origin workflows for low-value entries; prepare for \$80–200/item specifics during the transition when applicable.

3. Commodity & lane risk map

- Identify HS codes where MFN <15% (EU becomes 15%), metals, copper, pharma under review, agrifood. Prioritise US destinations with tight capacity/port constraints.

4. Transshipment controls

- Verify voyage and entry documentation closely to determine whether consignments qualify for transitional provisions. Strengthen routing oversight and supplier attestations; update SOPs to document genuine origin and direct shipment to avoid the +40% penalty risk.

5. Contract & pricing:

- Review contracts with clients and suppliers to manage potential legal, financial and operational risks, in view of ongoing trade negotiations and legal review.
- Include flexible wording in contracts and quotes to accommodate tariff volatility, clarify liability, and support routing or modal adjustments.
- Add tariff pass-through and routing-change clauses; define liability for misdeclaration; align quote validity with policy volatility.

6. Scenario planning (rolling):

- Model 15% sustained, sector carve-out success/failure, and reversal scenarios; map modal alternatives (ocean↔air, RFS options) and bonded/regime usage.

7. Internal training

- Run refreshers on classification/origin, ACE entries for parcels, Section 232 awareness, and client communications.

Market outlook and early volume signals

Early indicators suggest weaker sentiment in export-reliant EU sectors, with order deferrals and inventory cautions. Transport Intelligence (Ti) warns that Germany, in particular may face accelerated pressures in automotive and chemicals due to reliance on external demand. Ti cautioned that Germany, Europe's largest exporter, could be particularly exposed to shifting trade patterns, given its reliance on external demand to sustain growth.

According to Ti, this structural shift will also weigh on logistics markets: demand for container shipping, chemical shipping, and vehicle transport may weaken further. German motor vehicle output is already below 2019 levels, and the country is "ill positioned" to transition quickly to electric vehicle production. While import traffic into the EU may remain relatively stable, Ti concluded that the overall demand outlook for European freight and logistics services will not support strong growth in the near term.

ECB President Christine Lagarde indicated that, while the deal avoided a full trade war and is less severe than feared tariffs of over 20%, it will likely slow economic activity, with the ECB projecting 1.1% growth next year compared to 0.7% under a harsher scenario. Ms Lagarde stressed the need for the EU to diversify trade beyond the US to offset tariff impacts and support its export-driven economy, without explicitly calling for the approval of the EU-Mercosur trade deal. ([Reuters](#))

EU car exports to the US could fall by 15–20% over the next year if no exemptions are granted. The uniform 15% tariff will particularly affect price-sensitive models, raising landed costs and making them less competitive in the US market. Industry analysts note that relocation of some production to North America may reduce flows from EU ports, with a direct impact on vehicle handling volumes in Antwerp, Bremerhaven, and Zeebrugge. The German auto industry association (VDA) and European OEMs have already warned of significant risks to export performance under the new tariff regime.

Agri-food: Without exemptions, EU agri-food exports, particularly wine, spirits, and specialty food, face a potential decline of 10–15% over the next 12 months. The new US tariff framework imposes a 15% duty on these categories, adding to existing currency pressures from a weaker dollar. For example, Italian producers estimate losses of over €300 million for mainstream wine segments such as Valpolicella and Ripasso ([Reuters](#)), while US distributors are already signalling reduced orders or portfolio shifts to non-EU suppliers.

References

- US Executive Orders:
 - Reciprocal Tariffs (31 Jul 2025). ([The White House](#))
 - Suspending De Minimis (30 Jul 2025). ([The White House](#))
- CBP operational notices (CSMS) on entry procedures and any postal carve-outs. ([U.S. Customs and Border Protection](#))
- European Commission Q&A on the deal (28 Jul 2025). ([European Commission](#))