

# Tariffs and Trade Policy: A Roundtable With the ArentFox Schiff Electric Mobility Group

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Just two weeks before the November elections, podcast host Birgit Matthiesen gathers her colleagues to talk US trade policy. Her guests are well known within the electric mobility industry — David R. Hamill, partner and International Trade & Investment practice leader, Antonio J. Rivera, Electric Mobility practice group leader, and Associate James Kim. Listen in as they untangle the news from Washington, DC, and its real-world implications for the electric mobility sector — from investment strategy to procurement options.

They dive into ongoing US tariff applications, the complexity and tangle of trade regulations, and the importance of understanding critical legal definitions such as substantial transformation and “country of origin.” The discussion begins with the question of what a Trump 2.0 or Harris 1.0 Administration might change from the current direction of US trade regulations and tariffs in the context of ongoing geopolitical tensions. It ends with a look ahead to the upcoming United States-Mexico-Canada Agreement (USMCA) review consultations in 2025 and what companies could be doing now to best position their industry when formal talks are launched in mid-2026.

Highlights of the conversation include:

- How political landscapes significantly influence trade policies.
- Information on US tariffs and how they are designed to incentivize domestic manufacturing.
- Following the presidential election, US tariffs on a wide range of imports from China are likely to continue.
- Insights into how companies must prepare for the USMCA review in 2025.

- Asking the right questions to help untangle trade regulations.

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