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October 22, 2025



## **TARIFF UPDATE: Trump Signals Willingness to Negotiate China Tariffs as Experts Predict Modest Outcomes**

President Trump suggested a possible softening in his stance toward China, saying President Xi Jinping wants to “discuss the fact that they’re paying 157% tariff” and that he expects “a very successful meeting” later this month in South Korea. His remarks followed comments aboard Air Force One that any deal with China would require an end to fentanyl shipments, renewed U.S. soybean purchases, and restraint on rare earth restrictions.

The president said he doesn’t plan to add another 100 percentage points to tariffs on Chinese goods, noting, “That’s a nicer way of saying we don’t want to do business with you. I want them to thrive, but we have to thrive together.” Former U.S. trade officials Wendy Cutler and Chris Padilla said China’s new rare earth export controls show the risks of mixing trade and national security issues. Both expect the Seoul meeting to yield, at best, a status quo outcome, with China leveraging soybean and rare earth trade to extract concessions. Trump, meanwhile, continues to frame tariffs as both a negotiating tool and proof of U.S. economic strength.

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## **TRADE UPDATE: Trump Plans Tariff Hike on Colombia Amid Tensions Over Drug Policy**

President Trump said he plans to raise tariffs on Colombian goods beginning Oct. 21, escalating tensions following public criticism of Colombia's president, whom Trump accused of being "an illegal drug leader." The president also announced that the U.S. would stop providing anti-narcotics funding to Colombia, saying the country must "take responsibility for stopping cocaine trafficking."

Colombian imports currently face a 10% tariff, reflecting a trade imbalance favoring U.S. exports. Trump did not specify the new rate, saying only, "I'll let you know tomorrow." When asked about Argentina's economic situation and soybean exports to China, Trump instead noted that the U.S. may import a small amount of Argentine beef to lower domestic prices, calling beef "the only price that's high."

## **MINERAL UPDATE: U.S. and Australia Unite on Critical Minerals as EU, China Open Rare Earth Talks**

The U.S. and Australia signed a new Critical Minerals Development Framework on Oct. 20 aimed at strengthening mining and processing capacity and shielding supply chains from Chinese dominance in the rare earths sector. President Trump and Prime Minister Anthony Albanese said the agreement, four months in the making, will promote "standards-based systems" and potential price floors to counter "non-market policies and unfair trade practices." Despite ongoing 10% reciprocal tariffs on Australia, Trump called them "very light," emphasizing strong bilateral cooperation.

Meanwhile, EU and Chinese officials agreed to meet in Brussels in the coming days to discuss China's newly announced export controls on rare earths. EU Trade Commissioner Maros Sefcovic said the bloc hopes to find "urgent solutions," while China's Commerce Minister Wang Wentao defended the policy as a lawful step toward export control modernization. Wang noted that China continues to approve export licenses for EU companies and remains committed to "maintaining global supply chain stability."



## **PORT UPDATE: Tariff Uncertainty Slows Port of Oakland Trade Flow**

The Port of Oakland reported a decline in cargo volumes in September as tariff uncertainty and shifting global trade patterns disrupted typical seasonal activity. Port officials said market adjustments and frontloading earlier in the year contributed to softer import and export levels, particularly in agricultural and refrigerated shipments facing weaker overseas demand.

Despite the slowdown, the port remains operationally strong and resilient, with steady vessel calls and growing use of larger ships. Maritime Director Bryan Brandes said Oakland continues to demonstrate stability amid volatility, reflecting the confidence carriers and cargo owners have in its long-term role as a key U.S. trade gateway.

## **TRADE UPDATE: Blumenthal Says Russia Sanctions Bill Already Influencing U.S. Trade Actions**

Sen. Richard Blumenthal (D-CT) said his bipartisan Russia secondary sanctions bill—which allows tariffs of up to 500% on countries buying Russian fossil fuels—has already shaped U.S. trade policy, even before a Senate vote. The bill, co-sponsored by 85 senators, also expands sanctions on Russian officials and entities.

Although Senate Majority Leader John Thune (R-SD) delayed a vote until after a possible Trump-Putin meeting in Budapest, Blumenthal said he doubts the summit will occur and urged the administration to act decisively. He credited the bill's influence for Trump's recent 25% tariff hike on Indian goods, tied to that country's oil purchases from Russia. Blumenthal said this demonstrates the "sledgehammer" effect of the legislation, arguing that hesitation only emboldens Moscow. Despite the delay, he said Thune remains a supporter, and the bill has already had a "significant impact" on U.S. foreign policy direction.

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With regards,

LOGISTEED America, Inc.



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