

Aranceles estadounidenses: Impacto y medidas de respuesta

Análisis preliminar - Preparado por BCG Global Advantage Practice Area

ACTUALIZADO A 17:00 ET, 9 DE ABRIL DE 2025

Unprecedented Intensity of US Trade Actions



1. Potash imports also amended to 10% tariffs (down from 25%); 2. Executive Order cites authority under IEEPA, National Emergencies Act (NEA), Section 604, and Section 301 3. China country-specific rate raised to 105% after original announcement, all other countries ≤ 50% Source: Media reports; official government statements, CBC, X; BCG Analysis

Scale & Scope of Tariffs much greater than Trump I

Total punitive duties under Trump 1st Term

~\$425 B in US imports covered across 12,600 tariff lines²

Biden Term

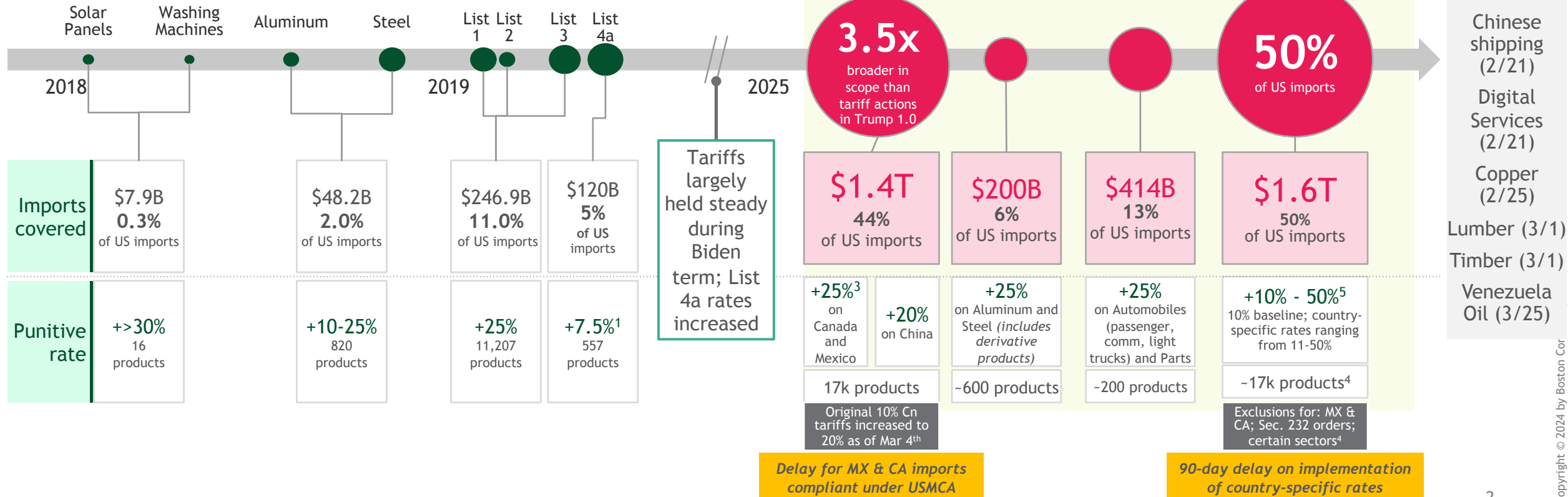
New duties under Trump 2nd Term to-date

Up to \$6.6T in US imports covered across 17,600 tariff lines²

"Safeguard"
Section 201 tariffs

"National Security"
Section 232 tariffs

China Investigation
Section 301 tariffs¹



1. Specific products may vary. Additional punitive duties went into effect on January 1st 2025, which increased punitive rates to 25%, 50% or 100%. 2. Excludes AD/CVDs. 3. 10% punitive ad valorem tariff imposed on energy imports from Canada and potash imports. 4. Excluded sectors include lumber, pharma, energy, etc. (specified in Annex II) 5. China's rate is 105% Source: BCG Analysis

La OMC considera que el trato NMF aún existe



Dra. Ngozi
Okonjo-Iweala,
DG de la OMC

*3 de abril de
2025*

"Es importante recordar que, a pesar de estas nuevas medidas, **la gran mayoría de los intercambios** comerciales mundiales siguen teniendo lugar con **arreglo al régimen de la nación más favorecida (NMF)** de la OMC.

Según nuestras estimaciones, **la proporción de estos intercambios es actualmente del 74%**, frente a aproximadamente el 80% a principios de año. Por lo tanto, los Miembros de la OMC tienen que hacer frente común para preservarlos."

Five priorities for businesses to prepare and act

Mobilize Now

1 Drive Swift Action with Tariff Impact Command Center

- Develop and tailor tariff impact scenarios, identify leading indicators and critical signposts for action
- Monitor unfolding events, assess tariff impact on landed cost and business, build response with levers below and mobilize action
- Engage and align top-of-house, strategic business leadership and mobilize cross-functional collaboration (BUs, Strategy, Ops, Marketing/Sales, Legal, Procurement, etc.)

Apply Proven Action Levers

2 Shape Policy¹

- Align C-suite leadership and engage policymakers proactively to reshape/delay tariff implementation or obtain exemptions
- Develop factual basis to support company advocacy by modeling trade impact scenarios and policy alternatives
- Have experts to understand shifting facts on the ground

3 Improve Trade Compliance¹

- Leverage tariff engineering (e.g., reclassification) to reduce costs and minimize risk
- Optimize trade structure through First Sale Rule, Delivery Duty Paid, and other levers
- Ensure real-time trade compliance

4 Refine Go-to-Market

- Adjust pricing and marketing strategies to new costs
- Optimize product specs and revisit product mix to focus on minimize cost and tariff impact
- Revisit markets & buyers to channel stock and planned volume

5 Reconfigure Supply Chain

- **5A | Tackle supply base** by certifying new suppliers and optimizing VAT and forex invoicing to reduce tariff exposure
- **5B | Address own supply footprint** by shifting production to lower-tariff locations and developing multi-site sourcing strategies **based on comparative tariff and labor costs**

1. BCG does not provide legal advice. BCG does not advocate on behalf of clients.

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