



Tri Star Metals

Delivering Stainless, Aluminum & Nickel Solutions

June 2, 2025

Dear Valued Partners,

We would like to provide you with an important update following the latest Section 232 action announced by President Trump. The rapid implementation of this increase is expected to impact our pricing structure. Please rest assured that we are committed to maintaining as much price stability as possible during this period. However, the immediate effect on our incoming raw material costs will make it challenging to offer consistent monthly pricing at this time.

Key Impacts to Note:

- **Blanket Orders:** Pricing on existing blanket orders may be affected.
- **Open Quotes:** All current open quotes will require re-confirmation.

We encourage you to reach out to your Tri Star Metals or SIRI Sales Professional for assistance in reviewing the potential impact on your blanket programs and quotes.

We appreciate your understanding and continued partnership as we navigate these challenges together.

Key Announcement: Doubling of Section 232 Tariffs

Effective Date: June 4, 2025

Action: President Trump has proposed doubling Section 232 tariffs on steel and aluminum imports from 25% to 50%.

Policy Background

- **Section 232 Reinstated:** As of March 12, 2025, Trump fully reinstated Section 232, eliminating:
 - All prior exemptions
 - Duty-free quotas
 - Product exclusions
- **Clarification on Exclusions:** Initially, existing exclusions were to be honored. However, it was later clarified that using an exclusion now triggers **reciprocal tariffs** from the exporting country.
- **Scope:** Applies to **all countries**, with no current exceptions.

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Analysis & Implications

Trade Impact:

- Likely to **escalate tensions** with U.S. allies.
- Potential **WTO violations** and risk of retaliatory tariffs or formal disputes.
- U.S. **downstream industries** (automotive, construction, manufacturing) expected to face:
 - **Higher input costs**
 - **Increased material shortages**

Global Supplier Response:

- **Asian exporters** (India, Taiwan, Vietnam) may no longer absorb tariff costs.
- Expected outcomes include:
 - **Rising prices**
 - **Supply disruptions**

Legal Status

- **Section 232:** Within presidential authority; **no legal challenges expected.**
- **IEEPA Tariffs:** Previously ruled unlawful by the U.S. Court of International Trade.
 - **Federal Circuit Court** has stayed the ruling.
 - Tariffs remain **active during appeal process.**

We will continue to provide updates as additional trade actions or information become available.

Jay Mandel

President & CEO | Tri Star Metals, LLC

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