

U.S. Reciprocal Tariff Matrix — ASEAN + Bangladesh + China & India

As of October 6, 2025

A. Core Rates

Country	Reciprocal Tariffs (latest EO)*	Extra Penalty (additive)	Transshipment Penalty	De Minimis (\$800)
Brunei	25%	—	40%	Off (suspended)
Cambodia	19%	—	40%	Off (suspended)
Indonesia	19%	—	40%	Off (suspended)
Laos	40%	—	40%	Off (suspended)
Malaysia	19%	—	40%	Off (suspended)
Myanmar	40%	—	40%	Off (suspended)
Philippines	19%	—	40%	Off (suspended)
Singapore	10% (baseline)	—	40%	Off (suspended)
Thailand	19%	—	40%	Off (suspended)
Vietnam	20%	—	40%	Off (suspended)
Bangladesh	20%	—	40%	Off (suspended)
India	25%	+25% (Russian-oil alignment)	40%	Off (suspended)
China (PRC)	10% reciprocal (temp., extended to Nov 10, 2025) + 20% fentanyl	—	40%	Off (suspended)

B. Sectoral Overlays

Country	Heavy Trucks (Sec. 232) (additive)	Pharma (branded/patented) (additive)	Wood: Upholstered Furniture (replaces reciprocal)	Wood: Cabinets / Vanities (replaces reciprocal)	Wood: Timber / Lumber (replaces reciprocal)	Notes
Brunei	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30% (Jan 1, 2026)	25% → 50% (Jan 1, 2026)	10%	EU/Japan caps 15% (wood only); UK 10% (wood only).
Cambodia	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Indonesia	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Laos	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	Elevated CLM base reciprocal.
Malaysia	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Myanmar	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Philippines	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Singapore	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	No EO-stated cap on reciprocal; wood caps are EU/JP/UK only.
Thailand	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—

Country	Heavy Trucks (Sec. 232) (additive)	Pharma (branded/patented) (additive)	Wood: Upholstered Furniture (replaces reciprocal)	Wood: Cabinets / Vanities (replaces reciprocal)	Wood: Timber / Lumber (replaces reciprocal)	Notes
Vietnam	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
Bangladesh	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	—
India	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	EO 14329 (+25% penalty) stacks with reciprocal (→ 50% pre- sectoral).
China (PRC)	25% (Nov 1)	Up to 100% (announced; paused; 'is building' exemption)	25% → 30%	25% → 50%	10%	Net: ~30% base (10 + 20) + Sec.301; reciprocal extended to Nov 10, 2025.

Notes & Application:

- “Reciprocal tariffs” are additional ad valorem under EO 14257 (Annex I) and add to MFN unless replaced by another instrument (e.g., wood-232).
- Transshipment penalty is 40% and applies in lieu of the reciprocal add-on. Do not assume it displaces other sectoral measures without explicit authority.
- Heavy trucks: 25% effective Nov 1, 2025 (additive).
- Pharma (branded/patented): up to 100% announced; currently paused pending negotiations; exemption where a manufacturer is “building” a U.S. plant (breaking ground/under construction).
- Wood chain (232, Sept 29): Upholstered furniture 25% (Oct 14, 2025) → 30% (Jan 1, 2026); Cabinets/Vanities 25% (Oct 14, 2025) → 50% (Jan 1, 2026);
- Lumber 10%. These replace reciprocal on covered HTS lines. EU/Japan caps 15% and UK 10% apply to wood items only.
- De Minimis: Suspended for all countries as of Aug 29, 2025 (monitor CBP for duration/updates).