



Navigating 2025 Tariffs and Global Trade Shifts for the Color Industry Supply Chain

May 2, 2025



Today's Panel



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Reminders

- Participants are reminded to adhere to CPMA/NAPIM **antitrust guidelines** during this webinar.
 - The information presented in this webinar is provided for **informational purposes only**.
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May 2, 2025

Foreign Trade Inks and Pigment Imports/Exports

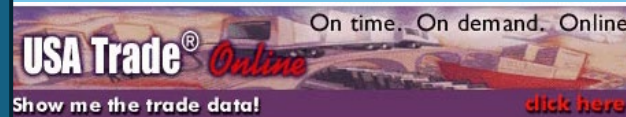
Organic Pigments Tariff Codes

3204.17.0405	PIGMENT BLUE 16
3204.17.0415	PIGMENT ORANGE 31
3204.17.0420	PIGMENT ORANGE 36
3204.17.0425	PIGMENT RED 144
3204.17.0430	PIGMENT RED 166
3204.17.0435	PIGMENT RED 177
3204.17.0485	PIGMENT BLACK 1 ETC. NESOI
	PIGMENT BLUE 15:3 DRY PRESSCAKE
	AQUEOUS SLURRY
3204.17.9002	PIGMENT BLUE 61
3204.17.9006	PIGMENT GREEN 7 NESOI
3204.17.9010	PIGMENT GREEN 36 NESOI
3204.17.9015	PIGMENT RED 57:1 DRY PRESSCAKE AQUEOUS
	SLURRY
3204.17.9018	PREPARATIONS BASED ON PIGMENT RED 57:1
3204.17.9019	PIGMENT RED 122
3204.17.9021	PIGMENT RED 149 NESOI
3204.17.9025	PIGMENT RED 179 NESOI
3204.17.9030	PIGMENT VIOLET 19 NESOI
3204.17.9035	PIGMENT VIOLET 23 NESOI
3204.17.9040	PIGMENT YELLOW 12 DRY PRESSCAKE
	AQUEOUS SLURRY
3204.17.9046	PREPARATIONS BASED ON PIGMENT YELLOW
	12
3204.17.9047	PIGMENT YELLOW 13 NESOI
3204.17.9050	PIGMENT YELLOW 74 NESOI
3204.17.9055	PIGMENT YELLOW 75 NESOI
3204.17.9060	



Printing Ink Tariff Codes

3215.11.9010	News (black)
3215.11.9020	Flexo (black)
3215.11.9030	Gravure (black)
3215.11.9040	Letterpress (black)
3215.11.9050	Offset/Litho (black)
3215.11.9060	Other (black)
3215.19.9010	News (non-black)
3215.19.9020	Flexo (non-black)
3215.19.9030	Gravure (non-black)
3215.19.9040	Letterpress (non-black)
3215.19.9050	Offset/Litho (non-black)
3215.19.9060	Other (non-black)



<https://usatrade.census.gov/>



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Foreign Trade

Inks and Pigment Imports/Exports

Inorganic Pigments Tariff Codes

3206.20.0010	CHROME YELLOW
3206.20.0020	MOLYBDENUM ORANGE
3206.20.0030	ZINC YELLOW
3206.20.0050	PIGMENTS & PREPS BASED ON CHROMIUM COMPOUNDS NESOI
3206.41.0000	ULTRAMARINE AND PREPARATIONS BASED THEREON
3206.42.0000	LITHOPONE & OTH PIGMTS & PREP BASED ON ZINC SULFIDE
3206.49.2000	PREPARATIONS BASED ON IRON OXIDES
3206.49.4000	PREPARATIONS BASED ON CARBON BLACK
3206.49.5500	PIGMENTS & PREPARATIONS BASED ON HEXACYANOFERRATES



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All Imports (black/non-black) 2024: \$552,265,275 45,596,250 kg (\$12/kg)

2024 full year (kg)

2025 YTD (kg)

		Month	2024	2025
CANADA	13,008,524			
INDIA	9,365,087			
JAPAN	5,030,906	Jan	3,297,843	3,719,522
ISRAEL	2,998,388	Feb	3,583,766	3,486,327
GERMANY	2,882,666			
SINGAPORE	2,130,982			
UNITED KINGDOM	1,757,211			
COSTA RICA	1,493,738			
KOREA SOUTH	1,163,222			
SPAIN	1,098,176			



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Printing Ink Exports (kg) Largest Trading Partners

All Ink Exports – Black and Non-black

2024 full year (kg)

2025 YTD (kg)

		Month	2024	2025
CANADA	21,361,236			
MEXICO	10,290,043	Jan	3,591,962	3,571,187
MALAYSIA	1,848,737	Feb	3,872,959	4,052,766
BRAZIL	1,290,239			
SINGAPORE	1,254,181			
CHINA	1,170,240			
COLOMBIA	1,160,190			
UNITED KINGDOM	939,999			

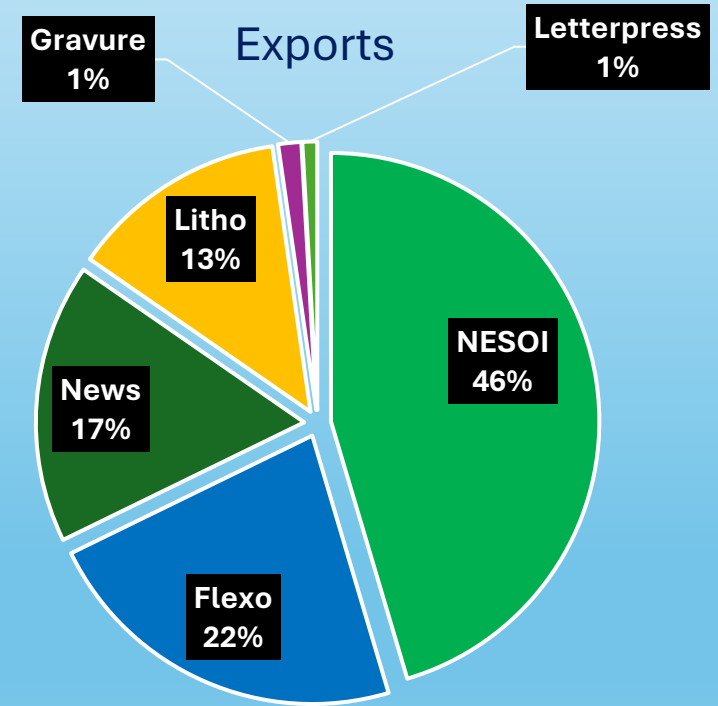
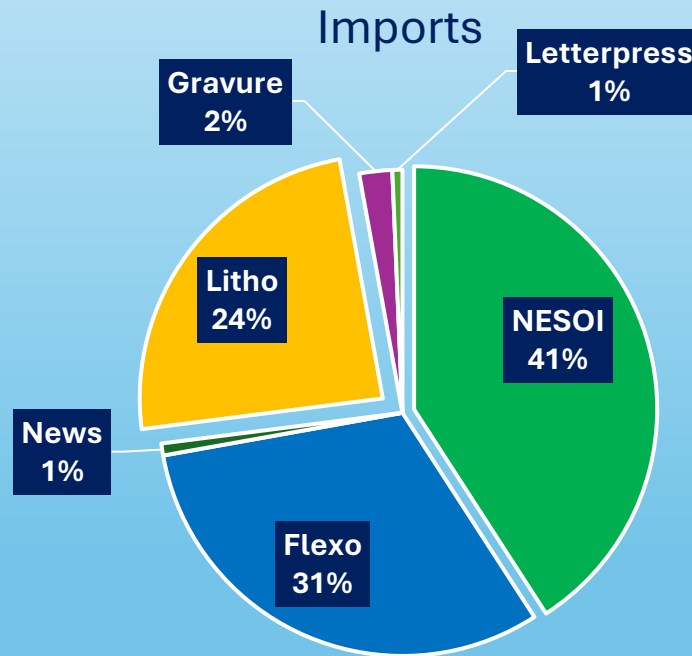
Printing Ink Imports/Exports Composition 2025

Imports \$\$

- FLEXOGRAPHIC: \$2.01/lb
- GRAVURE: \$1.68/lb
- LETTERPRESS: \$20.80/lb
- LITHO: \$2.59/lb
- NESOI: \$9.12/lb
- NEWS: \$3.98/lb

Exports \$\$

- FLEXOGRAPHIC: \$4.22/lb
- GRAVURE: \$9.84/lb
- LETTERPRESS: \$9.05/lb
- LITHO: \$2.72/lb
- NESOI: \$9.70/lb
- NEWS: \$5.38/lb





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Pigments Import Full Year 2024

Organic Pigments Import

Largest Trading Partners (inc TiO2)

Pigments Imports Kg and Value			
Color	Total Kg (ytd) 12/2024	Total \$ (ytd) 12/2024	
BLUE	3,169,038	\$19,735,276	
GREEN	3,903,201	\$28,435,178	
ORANGE	228,151	\$3,995,748	
RED	2,135,886	\$30,148,791	
VIOLET	893,803	\$28,588,412	
YELLOW	1,526,648	\$10,031,632	
BLACK	5,513,733	\$42,991,541	
WHITE	19,839,254	\$78,814,960	
Totals:12/2024	37,209,714	\$242,741,538	

Country	Quantity	Value
CANADA	15,350,219	\$54,834,820
INDIA	9,017,375	\$69,364,708
CHINA	5,848,003	\$33,374,946
MEXICO	1,463,477	\$7,936,067
GERMANY	1,250,161	\$32,904,497
ITALY	703,407	\$3,684,895
KOREA SOUTH	539,314	\$4,839,757
VIETNAM	536,395	\$921,366

2025 Year to date

Color	Total Kg (ytd) 2/2025	Total \$ (ytd) 2/2025
BLUE	578,517	\$3,871,014
GREEN	611,010	\$4,617,692
ORANGE	68,510	\$1,081,709
RED	403,721	\$6,120,541
VIOLET	165,991	\$5,869,537
YELLOW	232,154	\$1,456,876
BLACK	831,235	\$6,365,591
WHITE	3,179,802	\$11,552,188
Totals:2/2025	6,070,940	\$40,935,148



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Pigments Imports (Feb 2025 YTD)

Inorganic Pigments Import (w/o TiO2)

Color	Total Kg (ytd) 12/2024	Total \$ (ytd) 12/2024
BLACK	17,898,829	\$34,989,682
IRON OXIDES	6,251,801	\$21,390,008
ULTRAMARINE	5,595,107	\$21,555,883
CHROMIUM	890,545	\$8,577,165
HEXACYANOFERRATES	156,609	\$1,082,897
ORANGE	120,354	\$526,723
LITHOPONE	109,938	\$513,923
CHROME YELLOW	90,631	\$473,511
ZINC YELLOW	25,866	\$77,170
Totals	31,139,680	\$89,186,962

Largest Trading Partners (w/o TiO2)

Country	Quantity	Value
CHINA	5,199,218	\$3,803,736
INDIA	5,036,652	\$11,733,930
VIETNAM	4,406,814	\$3,002,615
MEXICO	3,055,567	\$17,953,171
COLOMBIA	2,632,810	\$7,541,101
ITALY	2,338,557	\$4,801,639
GERMANY	2,004,157	\$7,151,690

2025 Year to date

IMPORT TOTALS(INORGANIC):		
Color	Total Kg (ytd) 2/2025	Total \$ (ytd) 2/2025
ORANGE	38,698	\$130,117
YELLOW	35,356	\$148,223
CHROMIUM	213,115	\$1,872,579
ULTRAMARINE	1,461,403	\$5,407,277
LITHOPONE	65,268	\$145,213
BLACK	2,632,418	\$5,184,108
HEXACYANOFERRATES	103,325	\$685,246
IRON OXIDES	683,529	\$2,679,944
Totals:2/2025	5,233,112	\$16,252,707

CPMA/NAPIM Tariff Webinar

May 2, 2025

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Trump Tariffs - Fentanyl

- Fentanyl tariffs remain in place for USMCA imports that do not meet USMCA rules of origin.
 - For chemicals, including pigments – the chemical reaction rule is in place.
 - A change in classification 3204.11 through 3204.90 from any other subheading, (6-digits) including a subheading within this group.
 - Means dye-based pigments are originating.
 - A change to headings 3207 through 3215 from any other chapter.
 - Except from heading 3206 and 3212, except for TiO₂.
 - Means that Inks, Paints and Coatings need to have a territorial organic pigment or territorial TiO₂ to be considered USMCA compliant.
- If the USMCA Rules of Origin are not met, the tariff has been set at 25% for Mexico and Canada.
 - It is expected that importer would need to include tariffs that are associated with the “actual country of origin”.
- China & Hong Kong: 20% across the board – no exceptions.
- In transit rule: Items that were loaded onto a vessel at the port of loading, or in transit on the final mode of transport prior to entry into the United States, before 12:01 a.m. eastern standard time on February 1, 2025; and (2) are entered for consumption, or withdrawn from warehouse for consumption, on or after 12:01 a.m. eastern standard time on February 4, 2025, and before 12:01 a.m. eastern standard time on March 7, 2025.
- Canadian retaliation: None of the HTS numbers of interest in this presentation are of concern.
- Mexico has not yet retaliated.

“Current State of Reciprocal Tariffs”

- In-transit products are exempt from the reciprocal tariffs if (1) loaded onto a vessel at the port of loading and in transit on the final mode of transport prior to entry into the United States before 12:01 a.m. EDT on April 5, 2025, AND (2) are entered for consumption, or withdrawn from warehouse for consumption, on or after 12:01 a.m. EDT on April 5, 2025, and before 12:01 a.m. EDT on May 27, 2025.
- Rates:
 - USMCA is exempted for products that meet USMCA Rules of Origin
 - If USMCA ROO are not met, It is expected that importer would need to include tariffs that are associated with the “actual country of origin”.
 - China & Hong Kong: 125%, with exceptions
 - All other countries: 10%, with exceptions
- Trump Administration is said to be negotiating with dozens of countries to mitigate these tariffs.
- China has imposed substantial tariffs on U.S. Imports, including energy.

Illustrative Examples - Photoinitiators

Photoinitiators		China	China	China	China		All	Others	Canada	Canada
HTS	Base	301	Fentanyl	Reciprocal	China		Reciprocal		USMCA	Not USMCA
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Tariff	Total	Total	Total
2914.40.40	5.5%	25.0%	20.0%	125.0%	175.5%	Photoinitiators	10.0%	15.5%	free	variable
2918.30.25	6.5%	25.0%	20.0%	exempt	51.5%	Photoinitiators	exempt	6.5%	free	variable
2931.90.30	6.5%	25.0%	20.0%	125.0%	176.5%	Photoinitiators	10.0%	16.5%	free	variable

Illustrative Examples – Pigments

Pigments		China	China	China	China		All	Others	Canada	Canada
HTS	Base	301	Fentanyl	Reciprocal	China		Reciprocal		USMCA	Not USMCA
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Tariff	Total	Total	Total
3204.17.04	6.5%	25.0%	20.0%	125.0%	176.5%	Certain Organic Pigments	10.0%	16.5%	free	variable
3204.17.08	free	25.0%	20.0%	125.0%	170.0%	Certain Organic Pigments	10.0%	10.0%	free	variable
3204.17.20	6.5%	25.0%	20.0%	exempt	51.5%	Phthalao Blue Crude	exempt	6.5%	free	variable
3204.17.40	free	25.0%	20.0%	125.0%	170.0%	Certain Organic Pigments	10.0%	10.0%	free	variable
3204.17.60	6.5%	25.0%	20.0%	125.0%	176.5%	Certain Organic Pigments	10.0%	16.5%	free	variable
3204.17.90	6.5%	25.0%	20.0%	125.0%	176.5%	Certain Organic Pigments	10.0%	16.5%	free	variable
3206.11.00	6.0%	25.0%	20.0%	exempt	51.0%	TiO2 80% plus	exempt	6.0%	free	variable
3206.19.00	6.0%	25.0%	20.0%	exempt	51.0%	TiO2 other	exempt	6.0%	free	variable
3206.20.00	3.7%	25.0%	20.0%	125.0%	173.7%	Chromium Pigments	10.0%	13.7%	free	variable
3206.41.00	1.5%	25.0%	20.0%	125.0%	171.5%	Ultramarine Pigments	10.0%	11.5%	free	variable
3206.49.10	5.9%	25.0%	20.0%	125.0%	175.9%	Pigments in Plastics	10.0%	15.9%	free	variable
3206.49.20	6.5%	25.0%	20.0%	125.0%	176.5%	Iron Oxides	10.0%	16.5%	free	variable
3206.49.30	1.3%	25.0%	20.0%	125.0%	171.3%	Zinc Oxides	10.0%	11.6%	free	variable
3206.49.40	free	25.0%	20.0%	125.0%	170.0%	Carbon Black	10.0%	10.0%	free	variable
3206.49.55	3.7%	25.0%	20.0%	125.0%	173.7%	Hexacyanoferrates	10.0%	13.7%	free	variable
3206.49.60	3.1%	25.0%	20.0%	125.0%	173.1%	Other inorganic Pigments	10.0%	13.1%	free	variable

Illustrative Examples – Paints

Paints		China	China	China	China		All	Others	Canada	Canada
HTS	Base	301	Fentanyl	Reciprocal	China		Reciprocal		USMCA	Not USMCA
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Tariff	Total	Total	Total
3208.10.00	3.7%	25.0%	20.0%	125.0%	173.7%	Oil based polyesters	10.0%	13.7%	free	variable
3208.20.00	3.6%	25.0%	20.0%	125.0%	173.6%	oil based Vinyl Polymers	10.0%	13.6%	free	variable
3208.90.00	3.2%	25.0%	20.0%	125.0%	173.2%	other oil based Polymer bases	10.0%	13.2%	free	variable
3209.10.00	5.1%	25.0%	20.0%	125.0%	175.1%	Water based Vinyl Polymers	10.0%	15.1%	free	variable
3209.90.00	5.9%	25.0%	20.0%	125.0%	175.9%	Other water based	10.0%	15.9%	free	variable
3210.00.00	1.8%	25.0%	20.0%	125.0%	171.8%	Leather finishing	10.0%	11.8%	free	variable
3212.10.00	4.7%	25.0%	20.0%	125.0%	174.7%	Pigments for Stamping Foils	10.0%	14.7%	free	variable
3212.90.00	3.1%	25.0%	20.0%	125.0%	173.1%	put up for retail sale	10.0%	13.1%	free	variable
3213.10.00	6.5%	25.0%	20.0%	125.0%	176.5%	Artist colors in sets	10.0%	16.5%	free	variable
3213.90.00	3.4%	25.0%	20.0%	125.0%	173.4%	Other colors for artists	10.0%	13.4%	free	variable

Illustrative Examples – Inks

Inks		China	China	China	China		All	Others	Canada	Canada
HTS	Base	301	Fentanyl	Reciprocal	China		Reciprocal		USMCA	Not USMCA
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Tariff	Total	Total	Total
3215.11.10	free	25.0%	20.0%	125.0%	170.0%	solid black ink for Ch 84	10.0%	10.0%	free	variable
3215.11.30	1.8%	25.0%	20.0%	125.0%	171.8%	solid black ink other	10.0%	11.8%	free	variable
3215.11.90	1.8%	25.0%	20.0%	125.0%	171.8%	Other black inks	10.0%	11.8%	free	variable
3215.19.10	free	25.0%	20.0%	125.0%	170.0%	solid color ink for Ch 84	10.0%	10.0%	free	variable
3215.19.30	1.8%	25.0%	20.0%	125.0%	171.8%	solid color ink other	10.0%	11.8%	free	variable
3215.19.90	1.8%	25.0%	20.0%	125.0%	171.8%	Other colored inks	10.0%	11.8%	free	variable
3215.90.10	3.1%	25.0%	20.0%	125.0%	173.1%	Drawing inks	10.0%	13.1%	free	variable
3215.90.50	1.8%	25.0%	20.0%	125.0%	171.8%	Other Other Inks	10.0%	11.8%	free	variable

Illustrative Examples – Resins

Resins		China	China	China	China		All	Others	Canada	Canada
HTS	Base	301	Fentanyl	Reciprocal	China		Reciprocal		USMCA	Not USMCA
Numbers	Tariff	Surtax	Tariff	Tariff	Total	Product	Tariff	Total	Total	Total
3907.30.00	6.1%	25.0%	20.0%	exempt	51.1%	Epoxide Resins	exempt	6.1%	free	variable
3907.50.00	6.5%	25.0%	20.0%	125.0%	176.5%	Alkyd Resins	10.0%	16.5%	free	variable
3907.61.00	6.5%	25.0%	20.0%	exempt	51.5%	PET Resins	exempt	6.5%	free	variable
3909.40.00	6.5%	25.0%	20.0%	125.0%	176.5%	Phenolic Resins	10.0%	16.5%	free	variable

Tariffs on Ships

- Trump Administration has now imposed fees on Chinese Vessels operating into U.S. Ports. Goal is to boost U.S. Ship Building.
- Chinese operated Chinese vessels:
 - Fees start in 180 days at \$50/NT and then increase by \$30/NT.
- Operators of Chinese vessels:
 - Fees start in 180 days at \$18/NT and then increase by \$5/NT.
- A second phase will start in 3 years. Program is meant to last for at least 3 decades!
- This is a highly complex situation – this slide is not meant to present the entire picture – but to make you aware of these new fees to be imposed before the end of this year.

WARNING on Tariffs

- The Trump Administration is determined to prosecute “avoiders”.
- Most US Free Trade Agreements that impact the Chemical sector, except Israel, have the chemical reaction rule. The rules for Inks in many of the FTAs include restrictions on Inorganic Pigment tariff shifts. They vary on Paints and Coatings by agreement.
 - Israel has GSP style rules of origin – double substantial transformation and 35% value content.
 - Whenever an FTA is in place, it sets the standards for substantial transformation.
- If there is no FTA, then substantial transformation is the “standard”.
 - It is unlikely that the production of an Ink, paint or coating will meet the requirements for “substantial transformation.
 - When in doubt – seek a binding customs ruling.
- ***Note to U.S. Importers: The overseas shipper of a product is outside of the jurisdiction of the USA – the person to be prosecuted is the U.S. importer of record!***

Trade Issues Talk

**Please confirm all details in this presentation with your own experts
before taking any actions based on its content or verbal remarks!**

Thank You!

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Thank you!



Questions?

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