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100% Tariffs to Semiconductor

Sentiment Analysis, Impacts, and Recommendations

Policy Background

On Aug 6, 2025, Donald Trump announced a **100%** tariff on foreign-made **semiconductors**, citing the need to protect U.S. national security and revive domestic chip manufacturing. The policy targets imports from multiple countries, but market analysts note it could disproportionately affect suppliers in Asia. While officially framed as a push for technological independence, observers speculate the move indirectly addresses concerns over China's growing dominance in the semiconductor supply chain.



EXCLUDED SEMICONDUCTOR COMPANIES



Apple



TSMC



Samsung



GlobalWafers



SK Hynix



ASE

Sentiment Analysis Methodology



Data Source:

Twitter/X

Query:

"Trump 100% tariff"

Timeframe:

1 week before &
after announcement



Volume:

19 total tweets



Model Used:

Ollama
(*llama3:latest*)



Sentiment categories:

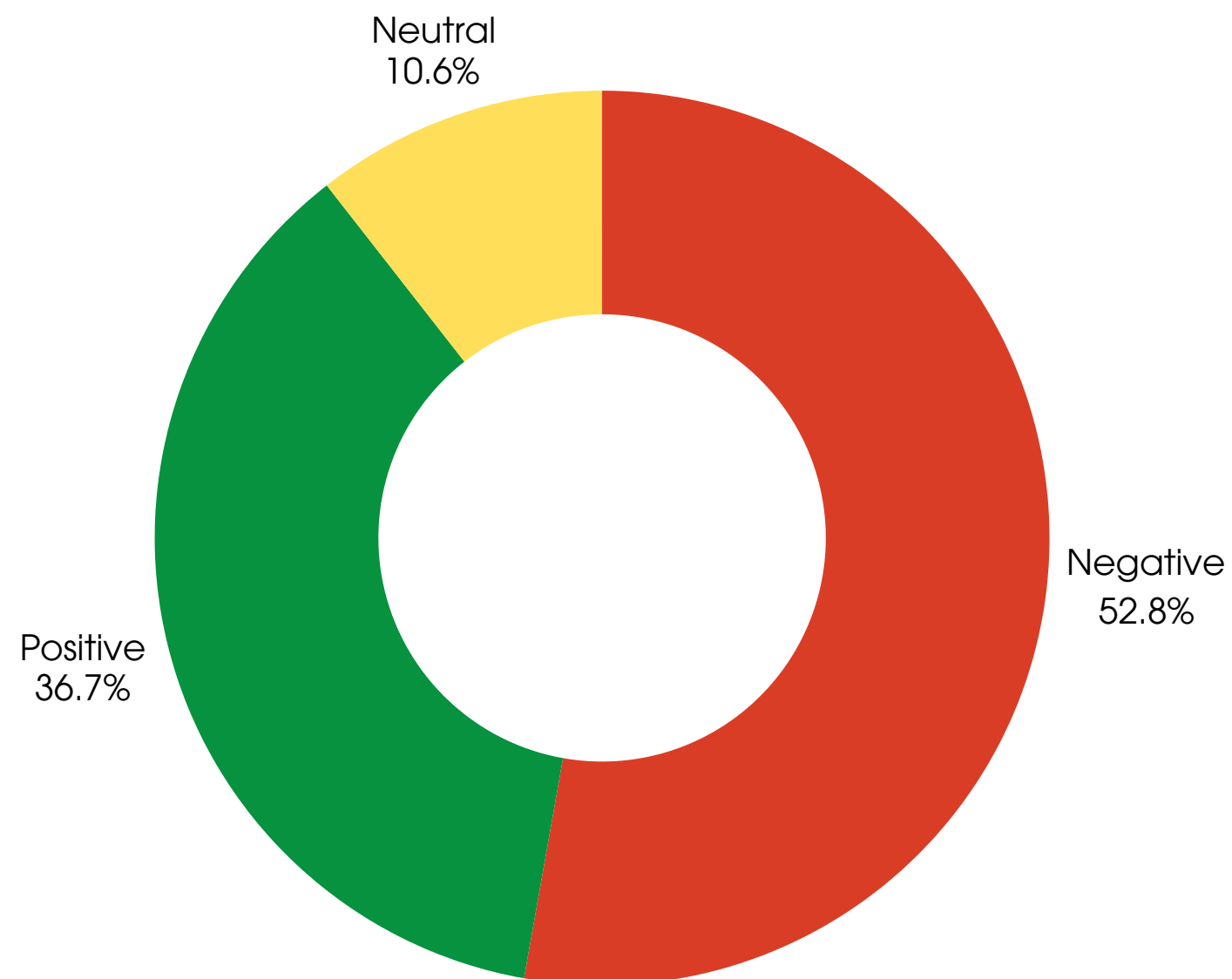
- Positive
- Neutral
- Negative



Tools:

- n8n
- twitterapi.io
- quickchart.io

Sentiment Distribution



Using Twitter data (via n8n and twitterapi.io), I analyzed 19 tweets on the policy:

Negative: 52.8%

Mostly triggered by its steep tariff rates, sparking fears of inflation, trade retaliation, and global market instability.

Neutral: 10.6%

Factual or news-sharing posts without clear sentiment.

Positive: 36.7%

Support for stronger trade defense and domestic job protection.

Overall, sentiment leans slightly negative, as economic concerns outweigh support for protectionism.

HOW IT'S AFFECT TO EXCLUDED SEMICONDUCTOR

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Taiwan Semiconductor Manufacturing, United States, NYSE:TSM, D

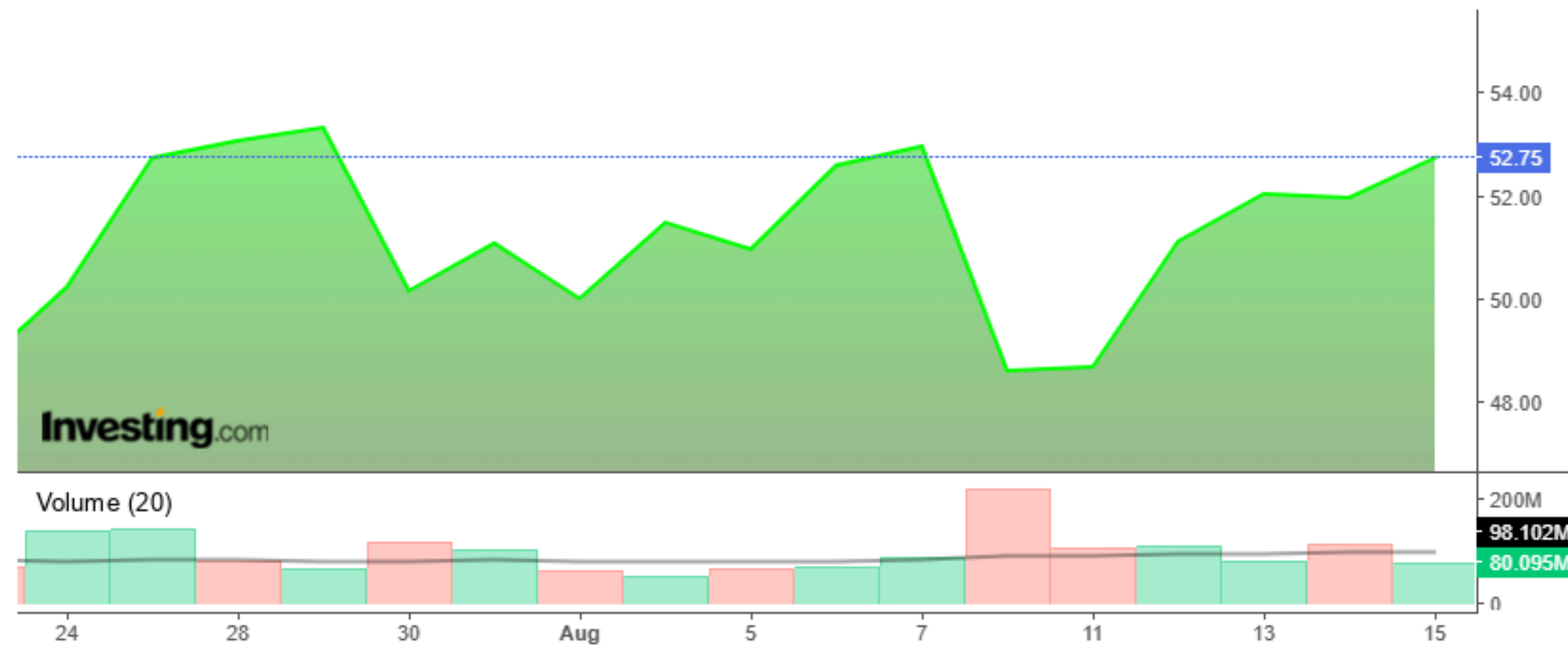


When Trump announced the **100% tariff** on foreign-made semiconductors on *August 6*, I initially assumed **TSMC** would take a hit. Instead, its stock price jumped **4.75%** in the days after. The reason: TSMC has invested over **\$40 billion** in U.S. manufacturing facilities, notably in Arizona, and remains a critical supplier for major American companies like **Apple** and **NVIDIA**. Targeting TSMC would disrupt U.S. tech supply chains, so the market viewed the company as effectively shielded from the tariff's impact—driving a short-term bullish reaction.

HOW IT'S AFFECT TO FOREIGN SEMICONDUCTOR

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Semiconductor Manufacturing International Corp, Hong Kong, HongKong:0981, D



On *August 6*, the U.S. announced new semiconductor tariffs targeting key **Chinese** companies, including **SMIC**, the country's largest chipmaker. This move is a direct challenge to China's tech ambitions in **AI** and **EVs**. The market reacted swiftly. SMIC's share price dropped about **8%** in a single day, reflecting investor fears over higher production costs and limited access to advanced equipment. Analysts warn that this pressure could slow down China's semiconductor progress, forcing companies to find costly and uncertain alternatives.

POSSIBLE ACTIONS



Supply Chain Diversification

Shift production to alternative hubs to reduce reliance on a single country.



Strategic Inventory Planning

Build safety stock for critical items to absorb sudden tariff shocks.



Scenario Planning

Model different tariff outcomes to enable faster, data-driven decisions.

KEY TAKEAWAY



Rising Costs & Supply Diversification

100% tariff on foreign semiconductors may raise U.S. electronics costs by 15–20% and push firms to diversify supply chains.

Strategic Tech Self-Reliance

Signals a strategic U.S. push for tech self-reliance, with potential reshoring worth billions.

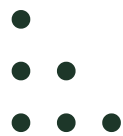
Short vs Long-Term Impact

Short-term: higher prices

Long-term: global manufacturing realignment and stronger U.S. leverage.



Thank You



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