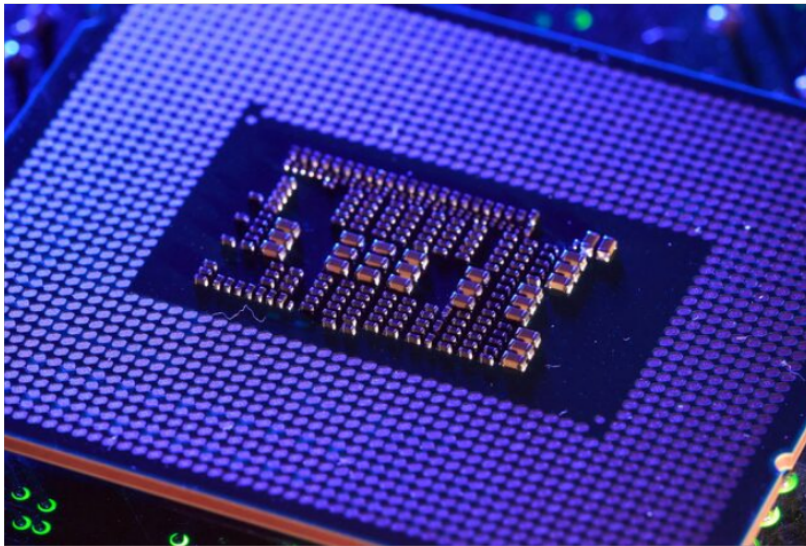




US plans 1:1 chip production rule to curb overseas reliance, WSJ reports

By Reuters

September 26, 2025 4:17 PM UTC · Updated September 26, 2025



Computer motherboard and Intel chip appear in this illustration taken August 25, 2025. REUTERS/Dado Ruvic/Illustration/File Photo [Purchase Licensing Rights](#)

Sept 26 (Reuters) - The U.S. is planning to push chipmakers to match the volume of semiconductors that their customers currently import from overseas providers through domestic production, or pay a tariff, the Wall Street Journal reported on Friday.

President Donald Trump has doubled down on his efforts to reshore semiconductor manufacturing, offering exemptions from [tariffs of roughly 100% on chips](#) to firms that produce domestically.

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Companies that fail to sustain a 1:1 domestic-to-import ratio over time would face tariffs, the Journal said.

U.S. Commerce Secretary Howard Lutnick floated the idea with semiconductor executives, telling them it might be necessary for economic security, the Journal said.

"America cannot be reliant on foreign imports for the semiconductor products that are essential for our national and economic security," the newspaper cited White House spokesperson Kush Desai as saying, who added that any reporting about policymaking should be treated as speculative, unless officially announced.

The White House and the U.S. Commerce Department did not immediately respond to Reuters' requests for comment.

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Trump's moves have spurred domestic and international companies to invest hundreds of billions of dollars in expanding U.S. manufacturing.



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Under the proposal, a company pledging to make chips in the U.S. would receive credit for that pledged volume, allowing imports without tariffs until the plant is complete, with initial relief to help ramp capacity, according to the report.

The 1:1 rule "would be very difficult to implement and would likely take many years. If anything, it could benefit companies that already have U.S. fabs," said John Belton, portfolio manager at Gabelli Funds, which holds shares in GlobalFoundries ([GFS.O](#)), Intel and other U.S. chipmakers.

Shares of GlobalFoundries, the world's third-largest contract semiconductor manufacturer, and struggling chip firm Intel ([INTC.O](#)), were both up 5%. The two companies are among the few chipmakers with significant U.S. manufacturing capacity.



Malta, New York-based GlobalFoundries has a [\\$16 billion investment plan](#), including factory expansions in New York and Vermont.

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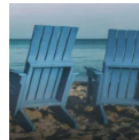
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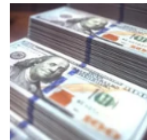
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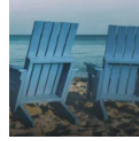
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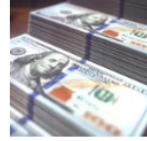
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