



William Huo @wmhuo168

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Buckle up: The U.S. just slapped 3,500% tariffs on solar panels from Southeast Asia, claiming China is cheating. But where was this righteous rage when Detroit was gutted and Bethlehem Steel left to die?



The U.S. slaps even more tariffs on Southeast Asia, as solar panels get...

The U.S. announced tariffs on Malaysia, Cambodia, Vietnam, and Thailand on Monday, capping a yearlong probe initiated by the Biden administration.

<https://fortune.com/asia/2025/04/22/us-solar-panel-tariffs-southeast-asia-cambodia/>

Let's start here. Protectionism only becomes a dirty word in D.C. when China does it better. When Beijing runs circles around American manufacturing, suddenly it's "unfair subsidies," "labor violations," or "national security." 2/18

But when Reagan nuked tariffs and Clinton cheered NAFTA, dismantling U.S. heavy industry? That was just "market efficiency" and "embracing globalization." Entire cities were sacrificed on the altar of shareholder value. Nobody wept. 3/18

Bethlehem Steel? Obliterated. Detroit? Left to rot. The working class was told to "upskill," "move," or "learn to code." Think tanks wrote paeans to the "creative destruction" of free markets. 4/18

Fast forward. Now China and its ASEAN partners dominate solar supply chains. Panels get built faster, cheaper, and better abroad. American firms can't compete. What does Washington do? Cry foul. 5/18

And suddenly the solar sector, an industry dominated by installers and importers, is treated like sacred national infrastructure. Biden's Commerce Dept goes nuclear with record-breaking tariffs. 6/18

Let's be real. These tariffs aren't about "saving American industry." They're about protecting a handful of well-connected firms like First Solar and Hanwha Qcells. Yes, Hanwha, which is as Korean as kimchi. 7/18

What about the 90% of the solar ecosystem—small installers, consumers, and utilities—who rely on affordable panels? They get crushed. Their costs will spike. Timelines delayed. Green transition hobbled. 8/18

This isn't industrial policy. It's a shakedown. A crooked game where failure is subsidized and efficiency is penalized if it's Chinese. 9/18

Where was this moral panic when South Korean cars buried Detroit? When Japanese steel outcompeted the U.S. on quality and price? When entire supply chains migrated to Shenzhen? 10/18

Washington was silent because those were the "acceptable casualties" of globalization. The casualties today, however, threaten Biden's Potemkin green economy. Now it's different. 11/18

The irony? American firms still depend on Chinese tech. Even panels "assembled" in Georgia or Ohio rely on Chinese polysilicon and wafers. The tariffs only shift costs, not supply chains. 12/18

Protectionism isn't wrong per se. Every rising power, the U.S. included, used it. But American protectionism now is reactive, erratic, and rigged for donors. 13/18

And unlike China's coherent industrial strategy, this is tariff theater. Politically expedient. Economically incoherent. Strategically suicidal. 14/18

Want to beat China? Out-build them. Out-educate them. Out-innovate them. Don't hide behind a 3,500% tariff and call it policy. 15/18

The solar industry isn't "too big to fail." It's just too connected to be left alone. And the American consumer? Once again, left holding the bill. 16/18

Bethlehem Steel was left to die. So was Detroit. But solar? Solar gets the red carpet, a subsidy, and a shield. This isn't about fairness. It's about who's in the room when policy gets written. 17/18

The age of globalization may be ending. But if this is how the U.S. plans to reindustrialize—through crony tariffs and Beltway lobbying—then the future won't be Made in America. It'll be botched in America. 18/18

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