



THE SECRETARY OF TRANSPORTATION
WASHINGTON, DC 20590

September 3, 2026

Mr. James Farley
Ford Motor Company
1 American Road
Dearborn, MI 48126

Dear Mr. Farley:

I am writing to express the profound concern of the U.S. Department of Transportation (DOT) regarding the strategic trajectory of Ford Motor Company (Ford or Company), specifically as it pertains to American national automotive manufacturing integrity, supply chain exposure, and reliance on technologies of foreign adversaries. While DOT recognizes the intense competitive pressures of the global market, the Company's recent strategic decisions paint a troubling picture of a foundational American brand actively intertwining its future with Chinese state-backed enterprises.

DOT remains deeply alarmed by Ford's continued reliance on licensed technology from Chinese battery manufacturer CATL at the operational BlueOval Battery Park facility in Marshall, Michigan. Although the facility has commenced production and assembled initial Lithium Iron Phosphate or LFP cells, the prioritization of imported Chinese technical expertise and operational know-how—even in a scaled-back capacity—challenges the spirit of American national and economic security and supply-chain independence policies. In addition, Ford's joint venture with Geely in Spain helps strategic adversaries secure a vital foothold in Western markets and the Company's ongoing talks with BYD for hybrid vehicle components could lead to further embedding subsidized foreign technology into Ford's core supply chains. Furthermore, the framework you proposed at the Detroit Auto Show to facilitate Chinese joint ventures on United States soil, alongside delaying the reshoring of Lincoln models like the Nautilus until 2030, leaves an unacceptable, multi-year window of reliance on Chinese manufacturing while depriving skilled American workers of vital manufacturing jobs.

When a company intentionally chooses to deepen operational dependencies on strategic competitors, it fails to act as the reliable partner the American public and this DOT require. Attempting to navigate current circumstances in ways that could enrich those very competitors is not a sustainable strategy for the United States. Ford must demonstrate a level of corporate citizenship that prioritizes the long-term resilience and technological sovereignty of the United States automotive ecosystem over short-term arrangements or questionable foreign alliances. Iconic American companies, like Ford, are also expected to out-innovate competitors. To that end, they need to chart clear paths to technological self-reliance.

I urge you to reflect on these concerns and national necessities and adopt reasonable strategies that prioritize American workers, utilize allied supply chains, and promote the self-reliance and integrity of the domestic automotive industry.

Sincerely,

A handwritten signature in blue ink, appearing to read "Sean P. Duffy". The signature is stylized with a large, sweeping "S" and a distinct "P" and "D".

Sean P. Duffy