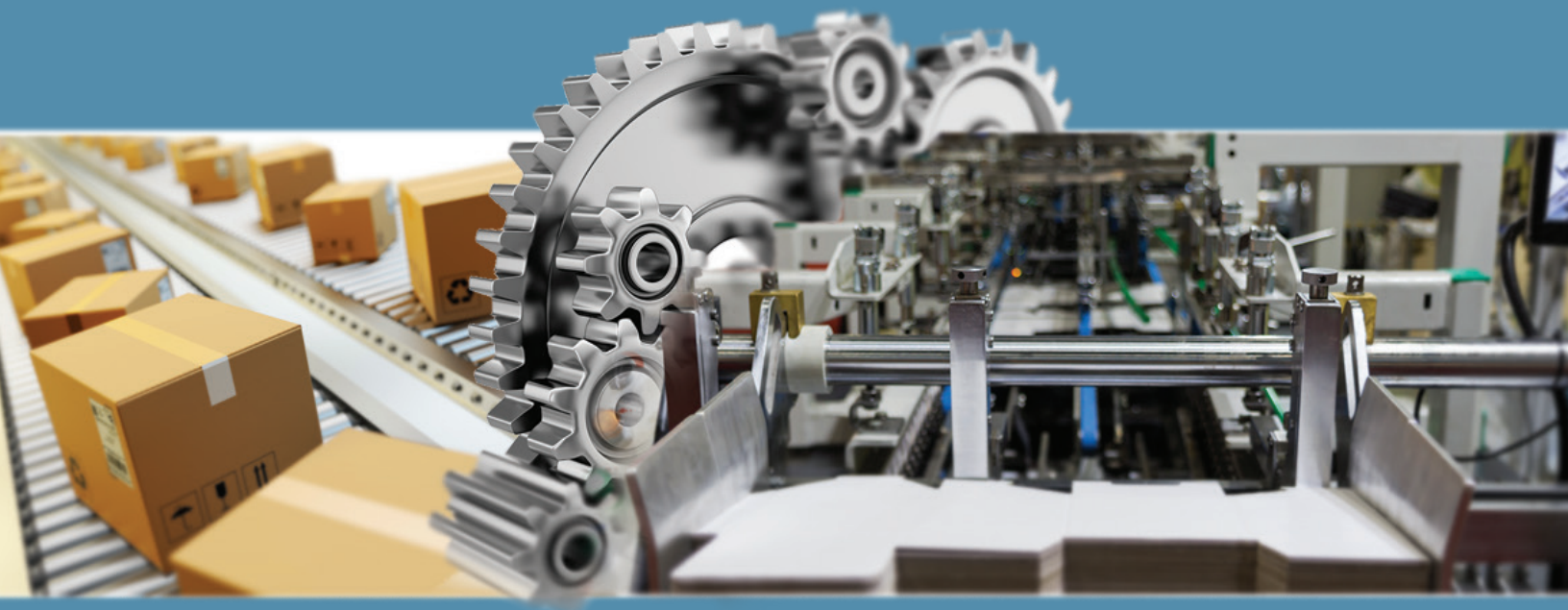




{ Business
Intelligence



Tariffs
QUICKIE SURVEY

2025

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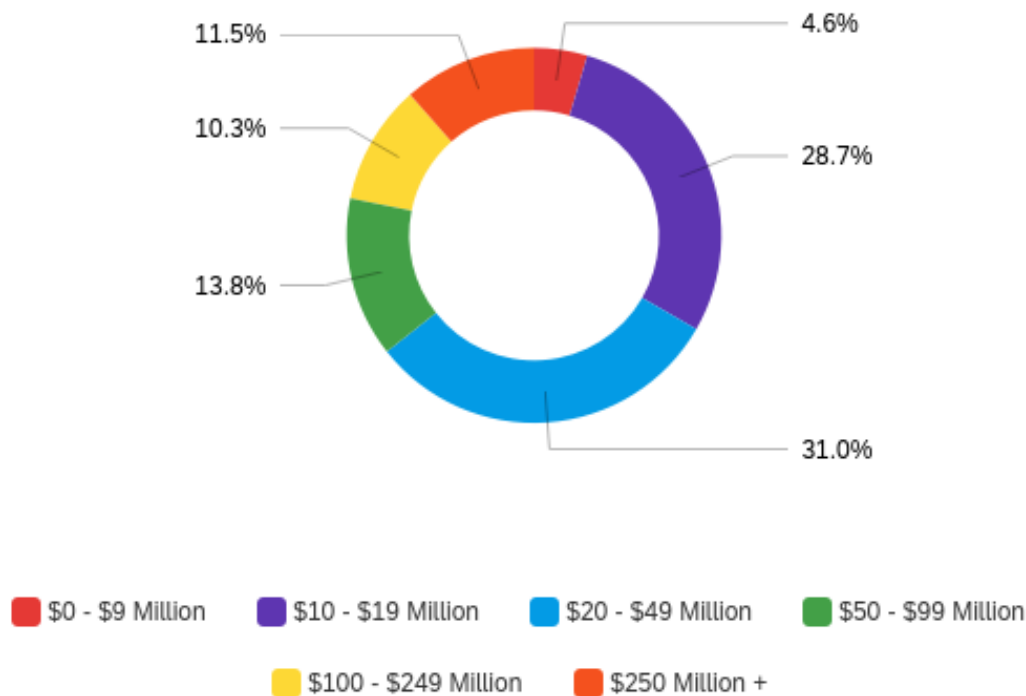
Objective: To benchmark how PMMI members are handling ongoing tariff updates.

Respondents = 87

Summary

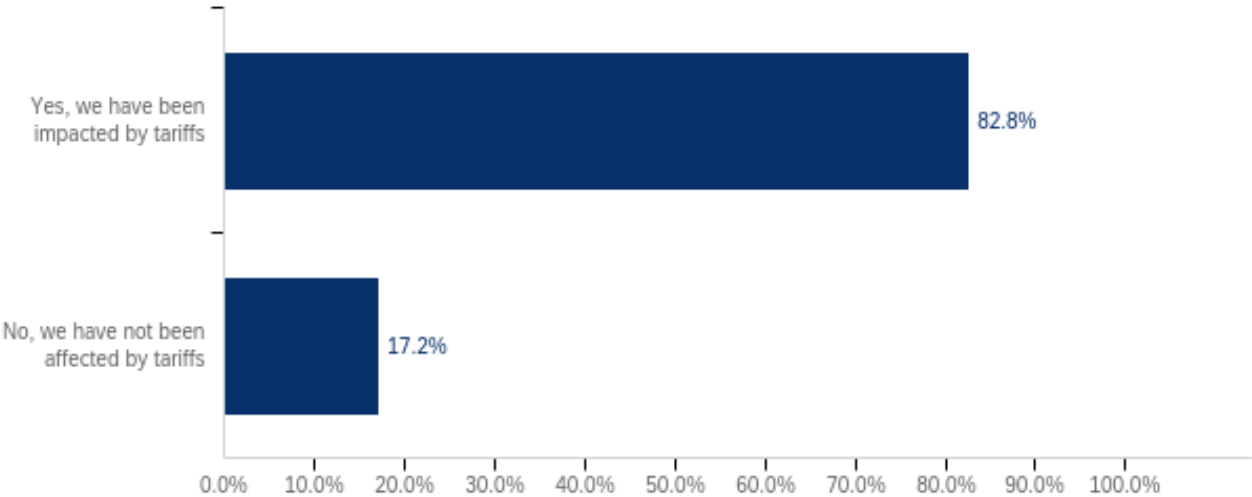
Most respondents (82.8%) have been impacted by the recently imposed tariffs. The most popular ways respondents are keeping track of tariffs are through general business news (77.0%), using other industry resources (outside of PMMI) (56.3%), and using PMMI tariff resources (39.1%). Some of these PMMI resources include our [Global Trends blog](#) and [town hall webinars](#). The most common ways the tariffs have impacted respondents' businesses include increased cost of procurement for imported parts (86.1%), price increases for domestic customers (CPGs) (59.7%), and increased cost of procurement for domestic parts (45.8%).

Annual Revenue



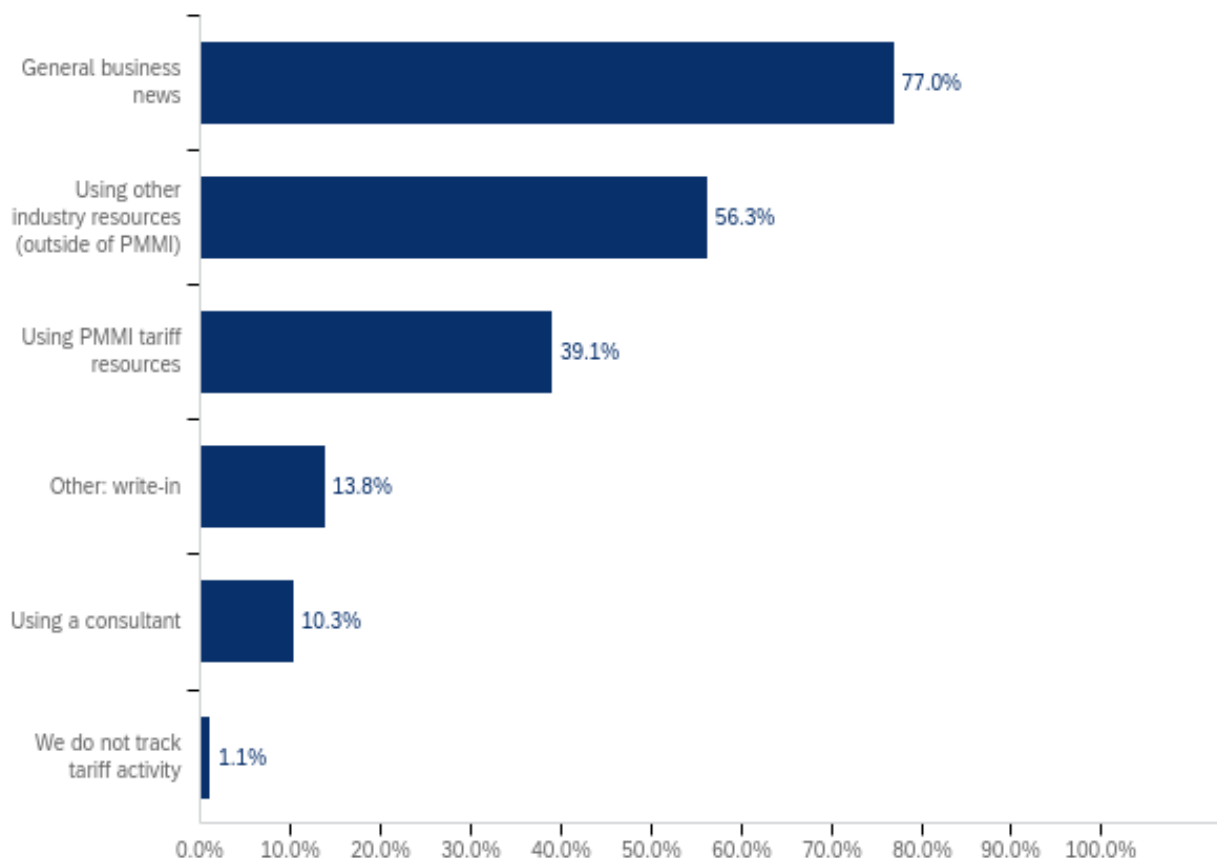
	Total	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Number of Respondents	87	4	25	27	12	9	10

1. Have you been impacted by any of the recently imposed tariffs?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Yes, we have been impacted by tariffs	50.0%	88.0%	74.1%	91.7%	88.9%	90.0%
No, we have not been affected by tariffs	50.0%	12.0%	25.9%	8.3%	11.1%	10.0%
Total	4	25	27	12	9	10

2. What are you doing to track the tariffs? (select all that apply)



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Using PMMI tariff resources	-	52.0%	48.1%	16.7%	33.3%	30.0%
Using other industry resources (outside of PMMI)	25.0%	44.0%	63.0%	58.3%	88.9%	50.0%
General business news	75.0%	88.0%	81.5%	66.7%	66.7%	60.0%
Using a consultant	-	8.0%	7.4%	8.3%	22.2%	20.0%
Other: write-in	-	8.0%	14.8%	8.3%	22.2%	30.0%
We do not track tariff activity	-	-	3.7%	-	-	-
Total	4	25	27	12	9	10

How to read this table: 52.0% of respondents in the \$10 - \$19 Million range selected "Using PMMI tariff resources".

Other: Write-in (by Revenue Range)

\$10 - \$19 Million

- Chat GPT
-
- Created an account to keep track of tariff related cost

\$20 - \$49 Million

- Vendor Relationships
-
- Internal team
-
- Hired lawyer for trade law and policy

\$50 - \$99 Million

- Suppliers & brokers

\$100 - \$249 Million

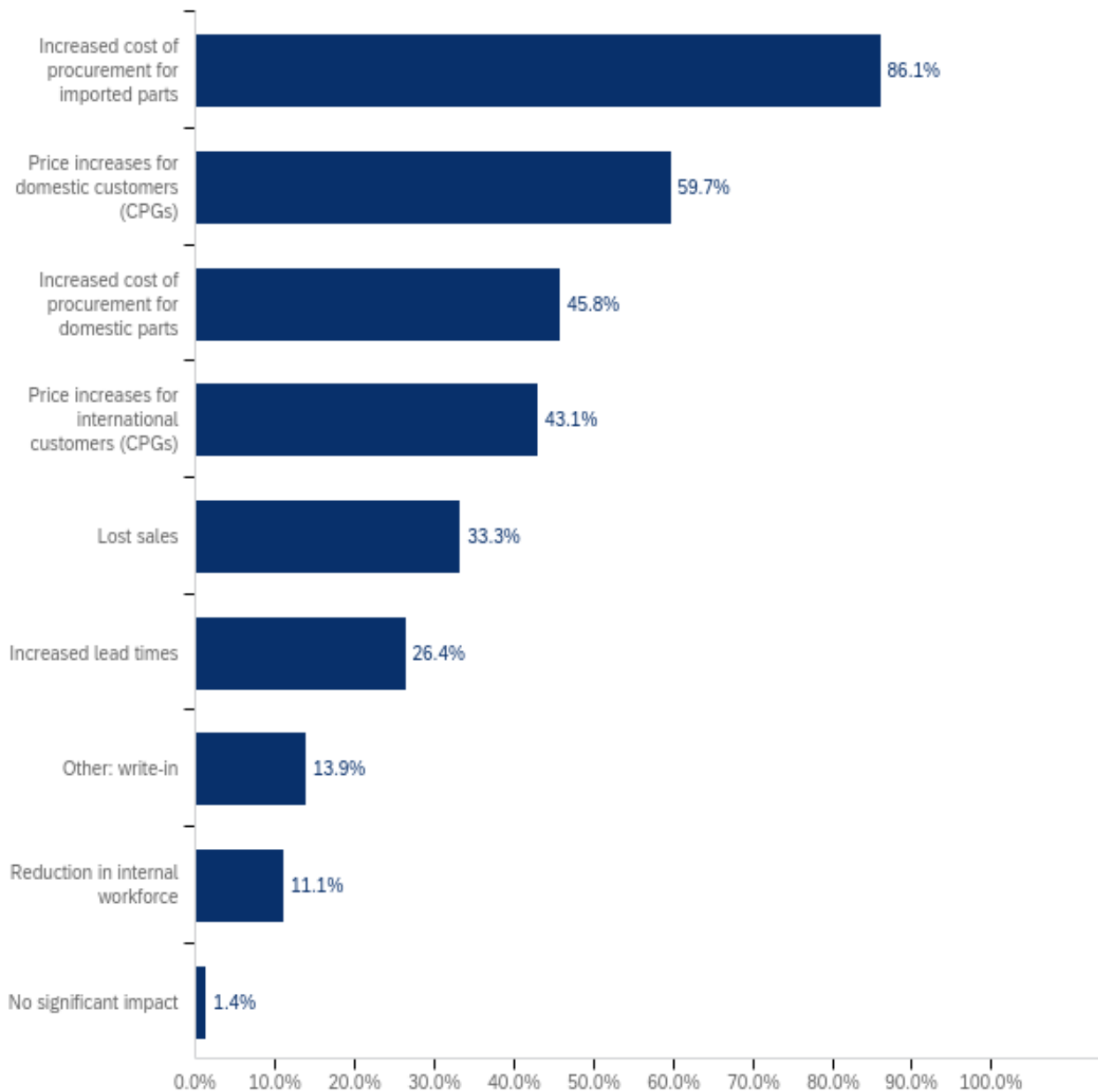
- Logging tariffs and implementing a company task force
-
- Working with our freight partners

\$250 Million +

- Dedicated team
-
- Internal dedicated team has been assembled
-
- Internal resources

3. How have the tariffs impacted your business (select all that apply)

Only those who responded "Yes, we have been impacted by tariffs" to Q1, received the remainder for the survey



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Increased cost of procurement for imported parts	100.0%	86.4%	85.0%	63.6%	100.0%	100.0%
Increased cost of procurement for domestic parts	-	54.5%	55.0%	36.4%	50.0%	22.2%
Price increases for domestic customers (CPGs)	-	63.6%	55.0%	81.8%	50.0%	55.6%
Price increases for international customers (CPGs)	50.0%	40.9%	50.0%	54.5%	25.0%	33.3%
Reduction in internal workforce	-	22.7%	10.0%	9.1%	0.0%	0.0%
Lost sales	-	50.0%	30.0%	18.2%	50.0%	11.1%
Increased lead times	50.0%	22.7%	20.0%	27.3%	50.0%	22.2%
Other: write-in	-	27.3%	10.0%	-	12.5%	11.1%
No significant impact	-	-	5.0%	-	-	-
Total	2	22	20	11	8	9

How to read this table: 86.4% of respondents in the \$10 - \$19 Million range selected "Increased cost of procurement for imported parts".

Other: Write-in (by Revenue Range)

\$10 - \$19 Million

- Paused sales
- Uncertainty
- Hesitancy by CPGs to place orders - cautious about spend, capex is heavily scrutinized and pulled back to wait and see
- Delayed orders
- Delayed Projects
- We are facing increases on parts that we are advised are imported by our domestic distributors. We do not have direct insight to actual tariff costs.

\$20 - \$49 Million

- Delays in orders as customers are saying that they need for Trump to have a written agreement in place and not the day to day changing of his mind.
- Passing along cost to customer; but not full cost; a certain percentage we are absorbing

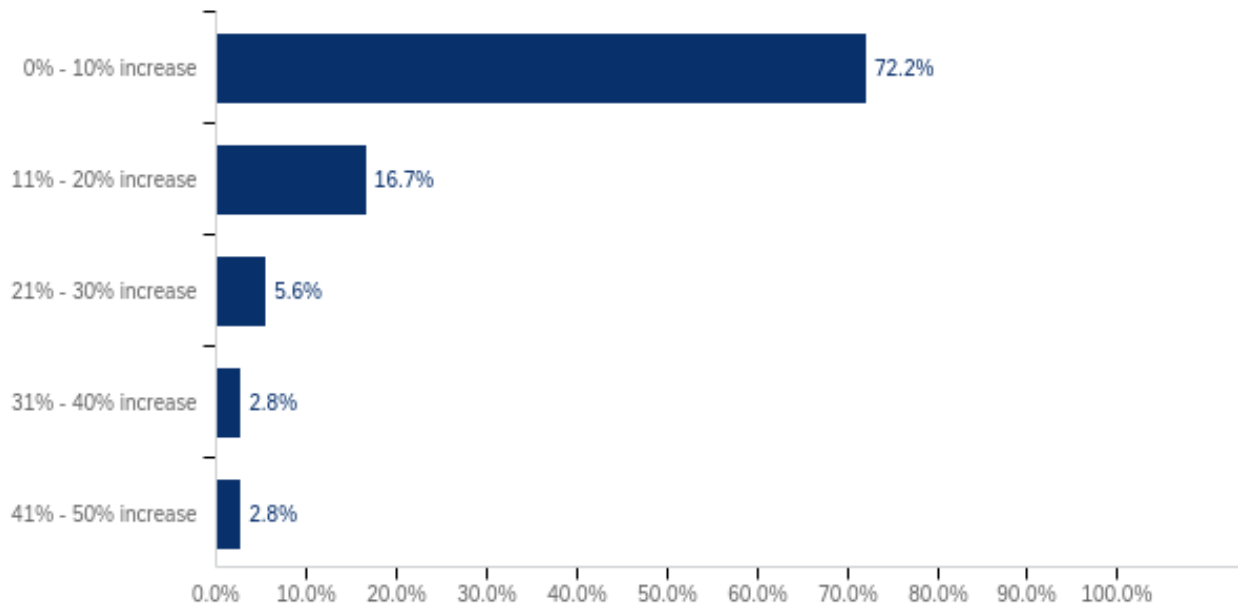
\$100 - \$249 Million

- Additional work and tools for tracking

\$250 Million +

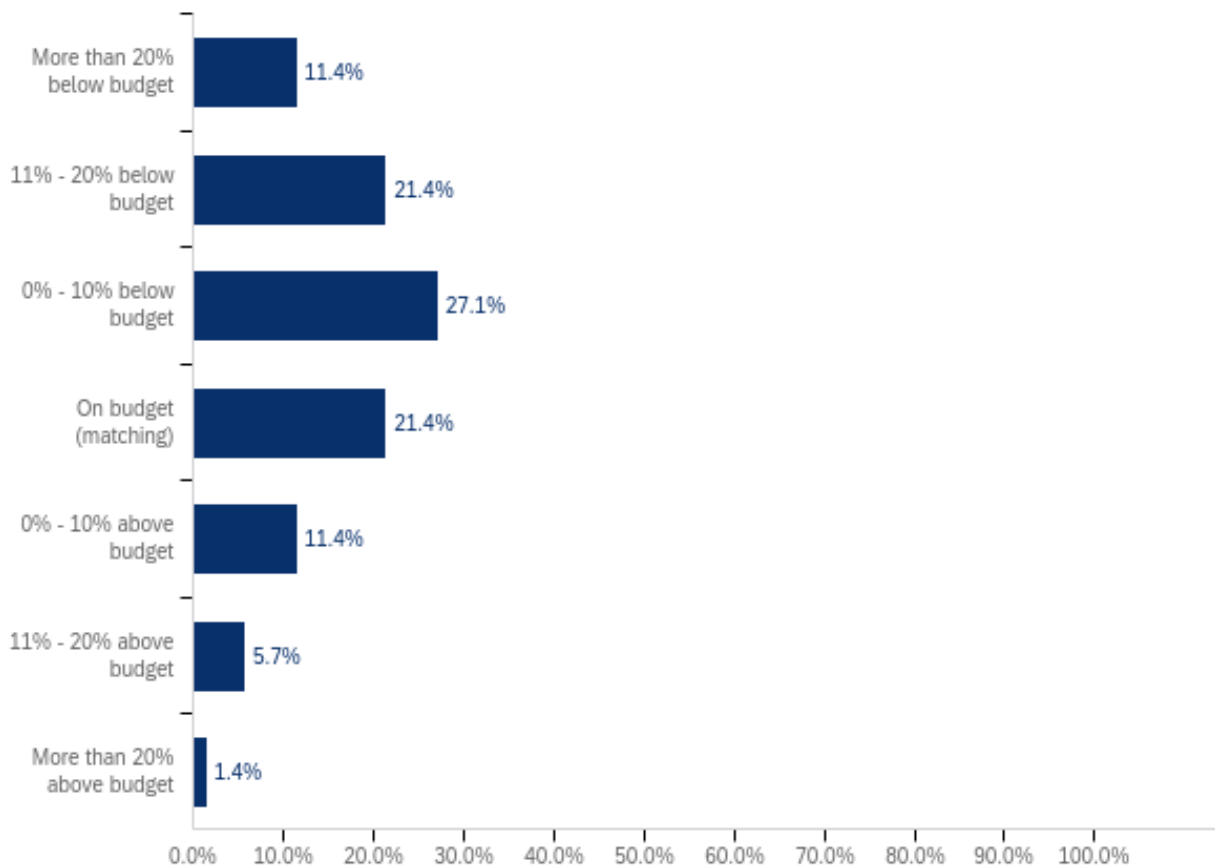
- Increased costs for customers

4. On average, by how much have your component prices increased since the beginning of the year?



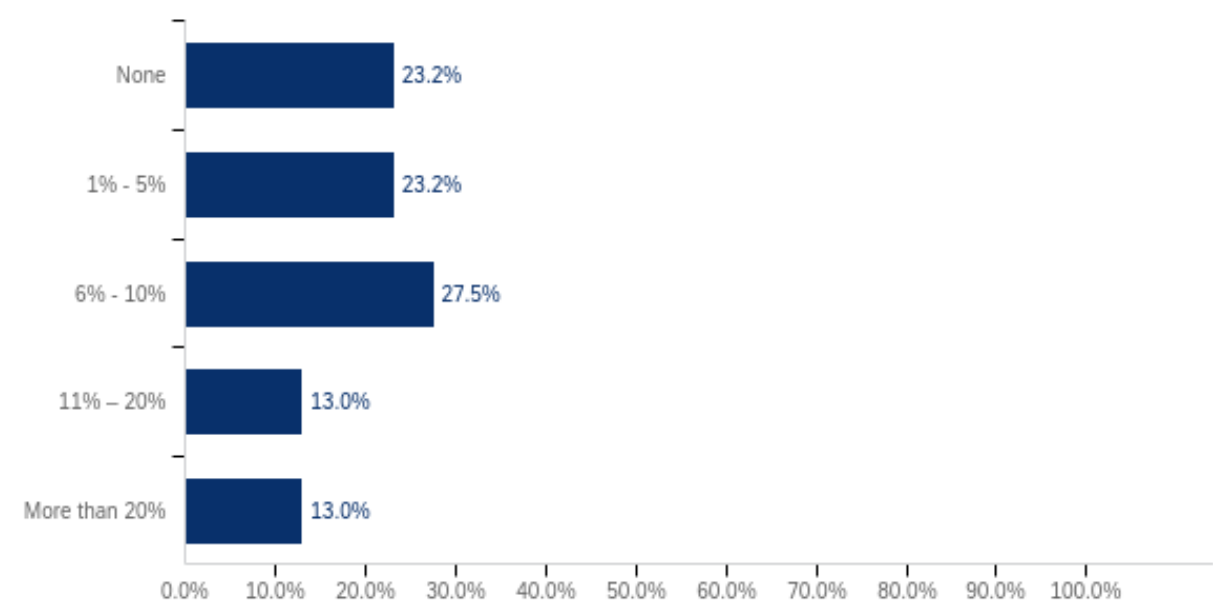
Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
0% - 10% increase	100.0%	72.7%	70.0%	63.6%	62.5%	88.9%
11% - 20% increase	-	22.7%	15.0%	9.1%	37.5%	-
21% - 30% increase	-	4.5%	5.0%	9.1%	-	11.1%
31% - 40% increase	-	-	10.0%	-	-	-
41% - 50% increase	-	-	-	18.2%	-	-
Total	2	22	-	11	8	9

5. How are your actual year-to-date (YTD) sales performing compared to your budget? (Please select the option that best reflects your YTD sales performance.)



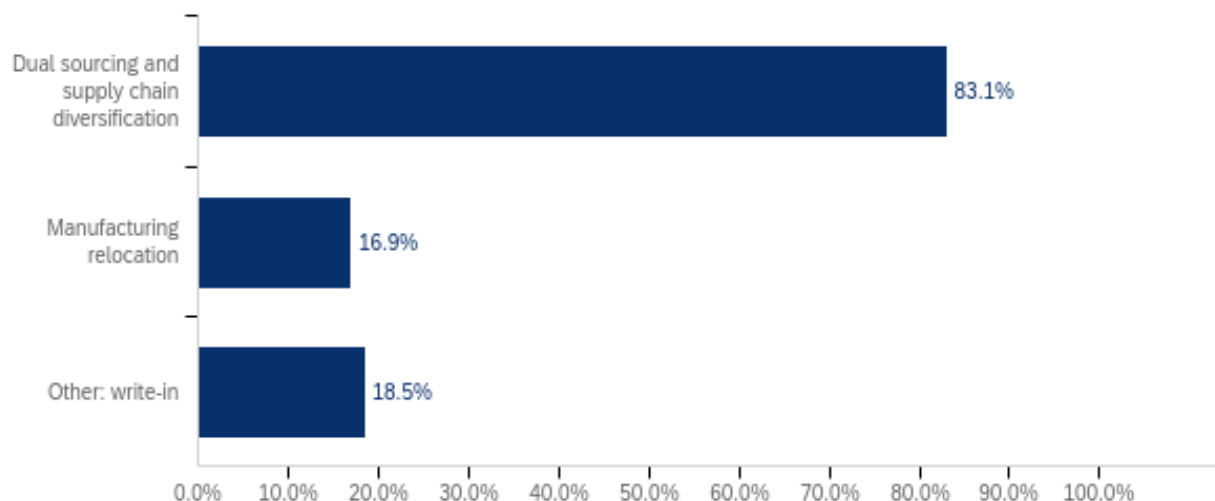
Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
More than 20% below budget	-	13.6%	21.1%	10.0%	-	-
11% - 20% below budget	-	22.7%	42.1%	-	25.0%	-
0% - 10% below budget	50.0%	18.2%	15.8%	40.0%	-	77.8%
On budget (matching)	-	18.2%	10.5%	40.0%	50.0%	11.1%
0% - 10% above budget	50.0%	13.6%	10.5%	10.0%	12.5%	-
11% - 20% above budget	-	9.1%	-	-	12.5%	11.1%
More than 20% above budget	-	4.5%	-	-	-	-
Total	2	22	19	10	8	9

6. What percentage of your quoted projects are currently on hold due to tariffs?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
None	100.0%	18.2%	26.3%	44.4%	12.5%	-
1% - 5%	-	27.3%	15.8%	11.1%	12.5%	55.6%
6% - 10%	-	22.7%	42.1%	22.2%	25.0%	22.2%
11% – 20%	-	18.2%	-	11.1%	37.5%	11.1%
More than 20%	-	13.6%	15.8%	11.1%	12.5%	11.1%
Total	2	22	19	9	8	9

7. How do you plan to work with your supply chain to reduce these costs once tariffs settle down?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Dual sourcing and supply chain diversification	100.0%	86.4%	87.5%	77.8%	75.0%	77.8%
Manufacturing relocation	-	9.1%	12.5%	11.1%	37.5%	33.3%
Other: write-in	-	18.2%	25.0%	11.1%	25.0%	11.1%
Total	1	22	16	9	8	9

How to read this table: 86.4% of respondents in the \$10 - \$19 Million range selected "Dual sourcing and supply chain diversification".

Other: Write-in (by Revenue Range)

\$10 - \$19 Million

- Mixture
- Passing along to customers as separate line item
- Our primary exposure is with non-direct importation of primarily controls and power train components or their sub-components. We have not been able to locate wholly domestic manufactures of these products.
- In some cases, we have no other option but the current suppliers.

\$20 - \$49 Million

- Not sure as not much of our components are manufactured by anyone in the USA
- Redesign to remove tariffed components
- Let customers on the Americas buy from sister companies in EU

\$50 - \$99 Million

- No change

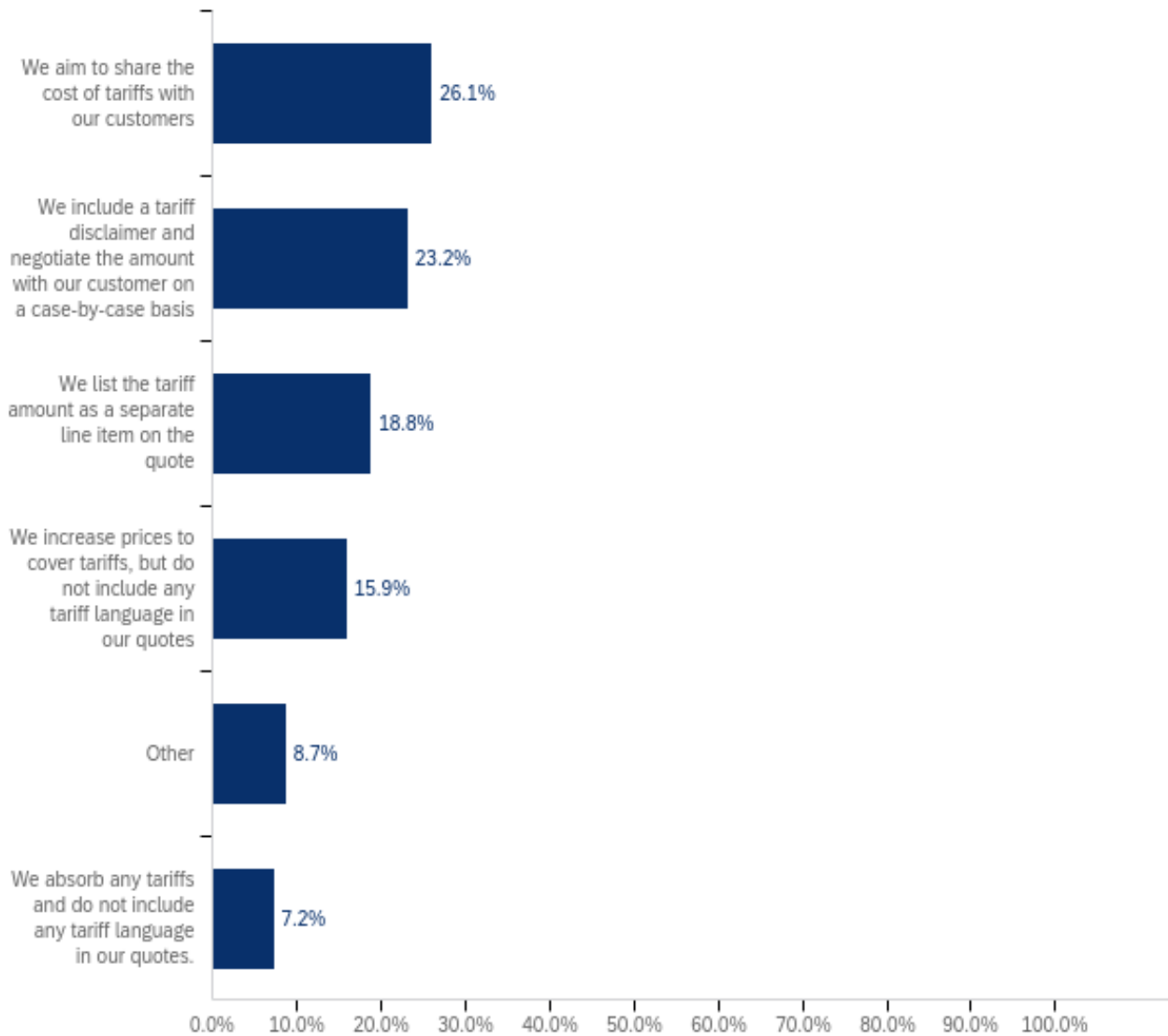
\$100 - \$249 Million

- We are waiting it out as I believe deals will get done at some point.
-
- Hard to tell until the country specific tariffs are finalized!

\$250 Million +

- Using it to our advantage

8. How are you addressing tariffs in your customer quotes?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
We aim to share the cost of tariffs with our customers	100.0%	27.3%	21.1%	30.0%	12.5%	25.0%
We include a tariff disclaimer and negotiate the amount with our customer on a case-by-case basis	-	13.6%	36.8%	-	25.0%	50.0%
We list the tariff amount as a separate line item on the quote	-	9.1%	21.1%	30.0%	37.5%	12.5%
We increase prices to cover tariffs, but do not include any tariff language in our quotes	-	27.3%	15.8%	10.0%	-	12.5%
We absorb any tariffs and do not include any tariff language in our quotes.	-	13.6%	-	10.0%	12.5%	-
Other	-	9.1%	5.3%	20.0%	12.5%	-
Total	2	22	19	10	8	8

Other: Write-in (by Revenue Range)

\$10 - \$19 Million

- Multiple above
- We increase the price to cover a portion of the tariff and absorb the rest but do not include any tariff language in our quotes.

\$20 - \$49 Million

- Customers have to know use their own Customs Brokers and pay them directly. If we have to do this, we will invoice them separately.

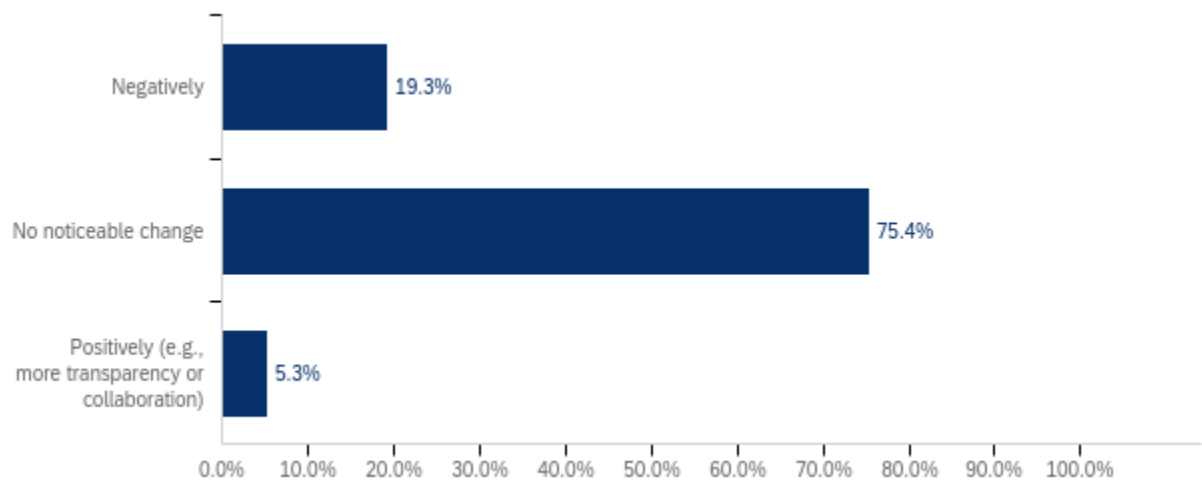
\$50 - \$99 Million

- Customers to import goods and pay tariffs, case by case.
-
- Combination - some tariffs are built into price and some are line item on quote, based on customer preference

\$100 - \$249 Million

- A combination of a disclaimer and separate line item on the quote.

9. How has passing tariffs on to your customers affected your relationship with them?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Negatively	-	23.5%	20.0%	-	33.3%	28.6%
No noticeable change	100.0%	76.5%	80.0%	80.0%	66.7%	57.1%
Positively (e.g., more transparency or collaboration)	-	-	-	20.0%	-	14.3%
Total	2	17	15	10	6	7

10. Any additional comments on navigating tariffs?

Responses by Revenue Range

\$10 - \$19 Million

- With this much uncertainty in the marketplace we have intentionally absorbed as much of the tariffs as possible. We negotiated with suppliers to help mitigate the costs. We also deal with foreign currency exchange and actively look to mitigate those risks as well. Consumers are aware of tariffs and sensitive to large price increases.
- We are rolling domestic increases in price from tariffs into the price while direct imported parts we re-sell we add a surcharge and tell our customers the country of origin and track that up and down based on current level.
- The tariffs have added uncertainty to the economy. Customers are reluctant to place orders. Of course there is additional costs that are not defined or subject to change which is driving uncertainty.
- The biggest issue is the indecision the tariffs are creating with our customers, they are sitting on CAPEX projects to see how the consumer is affected. Everyone is nervous about the economy and the daily barrage of tariff announcements is a big reason why.
- Quite unsettling how government(s) can ruin /make difficult for businesses to thrive
- Customers are expecting impacts from tariffs.
- As it was the case during COVID, our component suppliers such as [company name redacted] will not reverse the price increases once/if the tariffs are reversed. We have no choice but to increase our prices. If the tariffs do actually result in on shoring manufacturing, it will make the current skilled worker shortage even worse.

\$20 - \$49 Million

- US and Canada must come to an agreement so that we can move on and see a positive impact an agreement will have on the economy and buyer assurance of market stability.
- The tariffs negative impacts are more related to the uncertainties which slows down the investments. Perhaps as a Canadian company, some clients might fear to deal with us, but it does not seem to happen often, so very little impact here
- Can't wait until it stops
- Any certainty with tariffs will allow to plan both short and long term. Until then, the chaos is very difficult to navigate.

\$50 - \$99 Million

- Would like to understand how others in our industry are handling 50% foil tariff. Foil tariffs make international competition even more difficult as imported finished products that include foil as a component do not receive tariff.
- The hours/weeks spent trying to work through tariff issues takes away from time that could be spent on other business improvements.

\$100 - \$249 Million

- What do you recommend staying on top of the tariffs. It looks right now that the tariffs are changing daily which is hard to follow. We do see prices continue to increase. What about a recession update, are we going to see this or not?

\$250 Million +

- We need stability - the week of July 9th is a crucial week



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