

2026 Q2 Tariffs



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

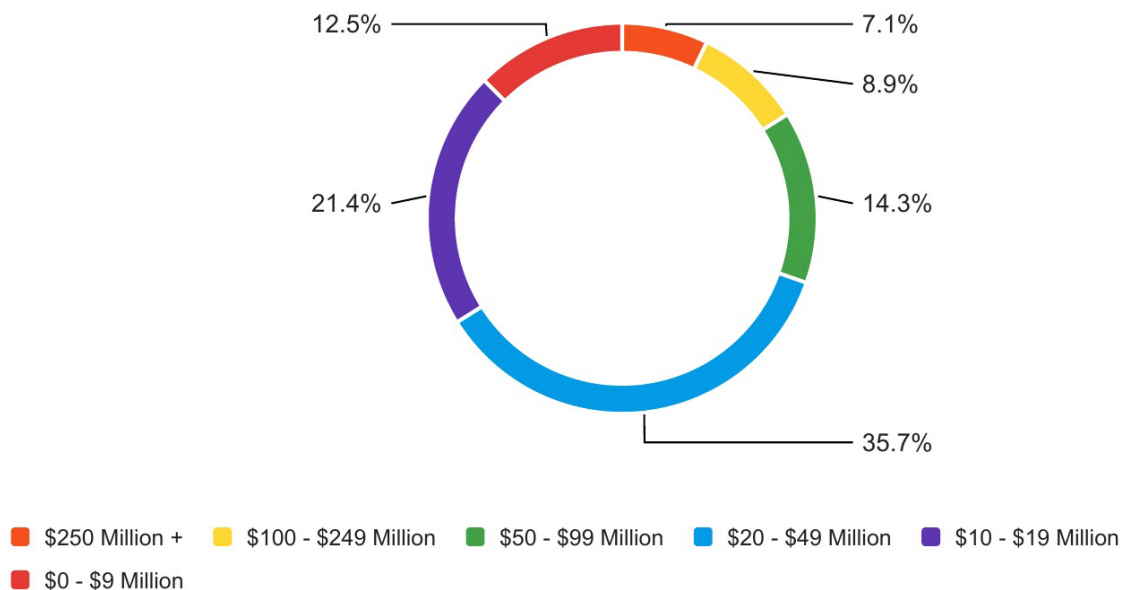
Respondents = 56

Summary

This Quickie Survey was deployed to the membership starting in Q2 2025. Charts for each question will show data from the previous quarter for comparison purposes.

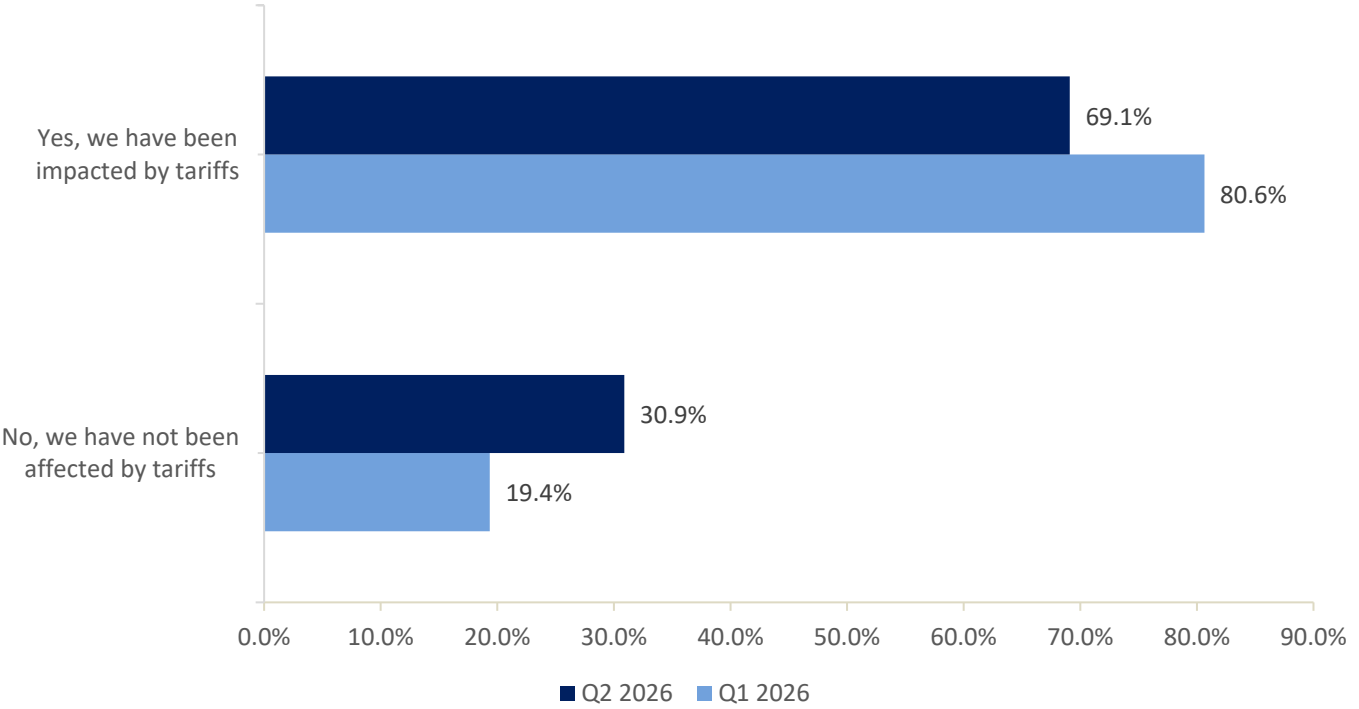
The share of respondents reporting a tariff impact fell this quarter, from 80.6% to 69.1%. The most common ways tariffs are impacting businesses include increased cost of procurement for imported parts (92.1%), price increases for domestic customers (CPGs) (63.2%), and increased cost of procurement for domestic parts (55.3%). Nearly half of respondents in Q2 (47.4%) have seen an 11%-20% increase in component prices since January 2025. A new question this quarter asked members where they are in the tariff refund process. Half of respondents have already moved forward with tariff refund requesting, with 27.8% having submitted a request that is pending review and 22.2% having already received a refund.

Annual Revenue



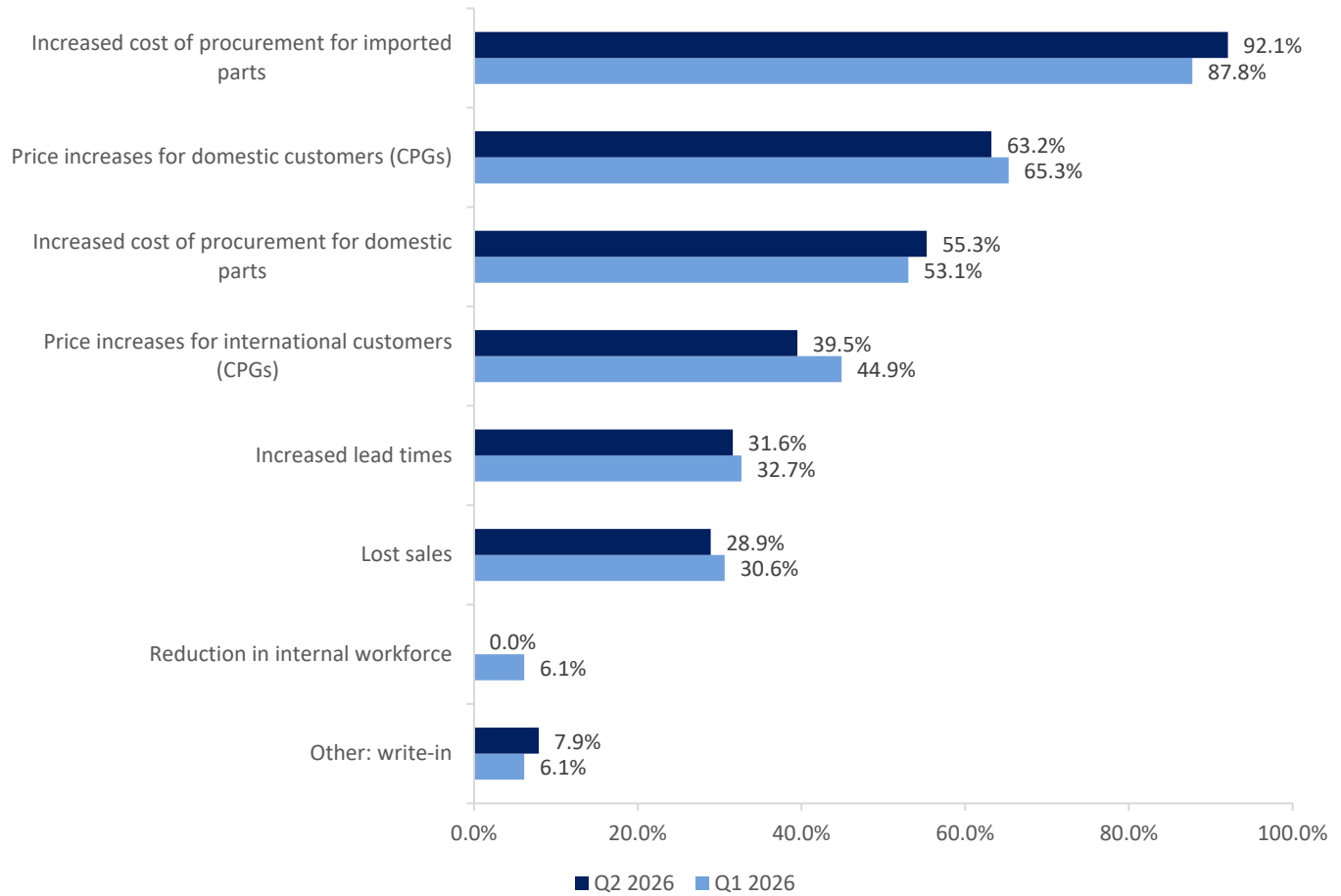
	Total	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Number of Respondents	56	7	12	20	8	5	4

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	71.4%	81.8%	70.0%	37.5%	80.0%	75.0%
No, we have not been affected by tariffs	28.6%	18.2%	30.0%	62.5%	20.0%	25.0%
Total	7	11	20	8	5	4

2. How have the tariffs impacted your business? (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 +
Increased cost of procurement for imported parts	80.0%	88.9%	100.0%	66.7%	100.0%	100.0%
Price increases for domestic customers (CPGs)	40.0%	88.9%	57.1%	33.3%	75.0%	66.7%
Increased cost of procurement for domestic parts	40.0%	66.7%	42.9%	66.7%	75.0%	66.7%
Price increases for international customers (CPGs)	40.0%	77.8%	14.3%	66.7%	50.0%	-
Increased lead times	40.0%	11.1%	35.7%	33.3%	75.0%	-
Lost sales	60.0%	11.1%	21.4%	-	100.0%	-
Reduction in internal workforce	-	-	-	-	-	-
Other: write-in	-	-	7.1%	33.3%	25.0%	-
No significant impact	-	-	-	-	-	-
Total	5	9	14	3	4	3

How to read this table: 80.0% of respondents in the \$0 - \$9 Million range selected "Increased cost of procurement for imported parts".

Other: Write-in (by Revenue Range)

\$20 - \$49 Million

- Increased price for our equipment from our headquarters in Germany.

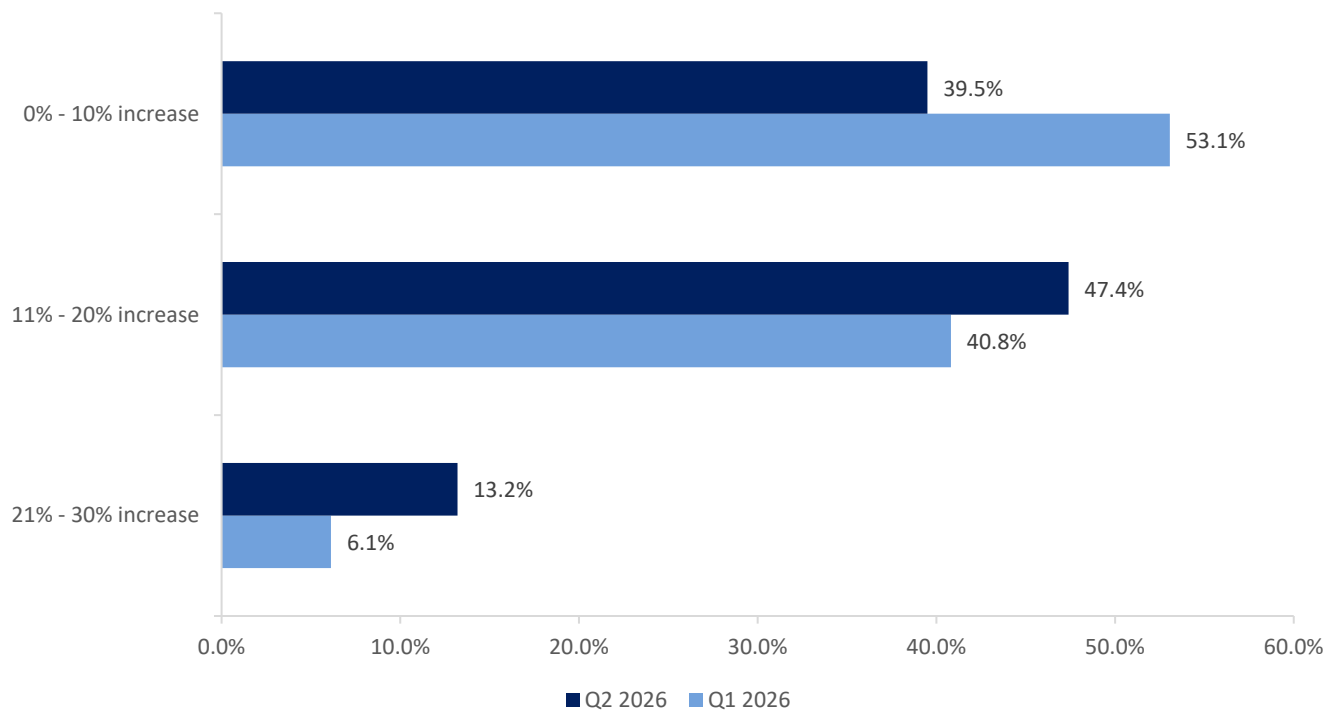
\$50 - \$99 Million

- Slower hiring practices to mitigate the tariff costs.

\$100 - \$249 Million

- Killing profits

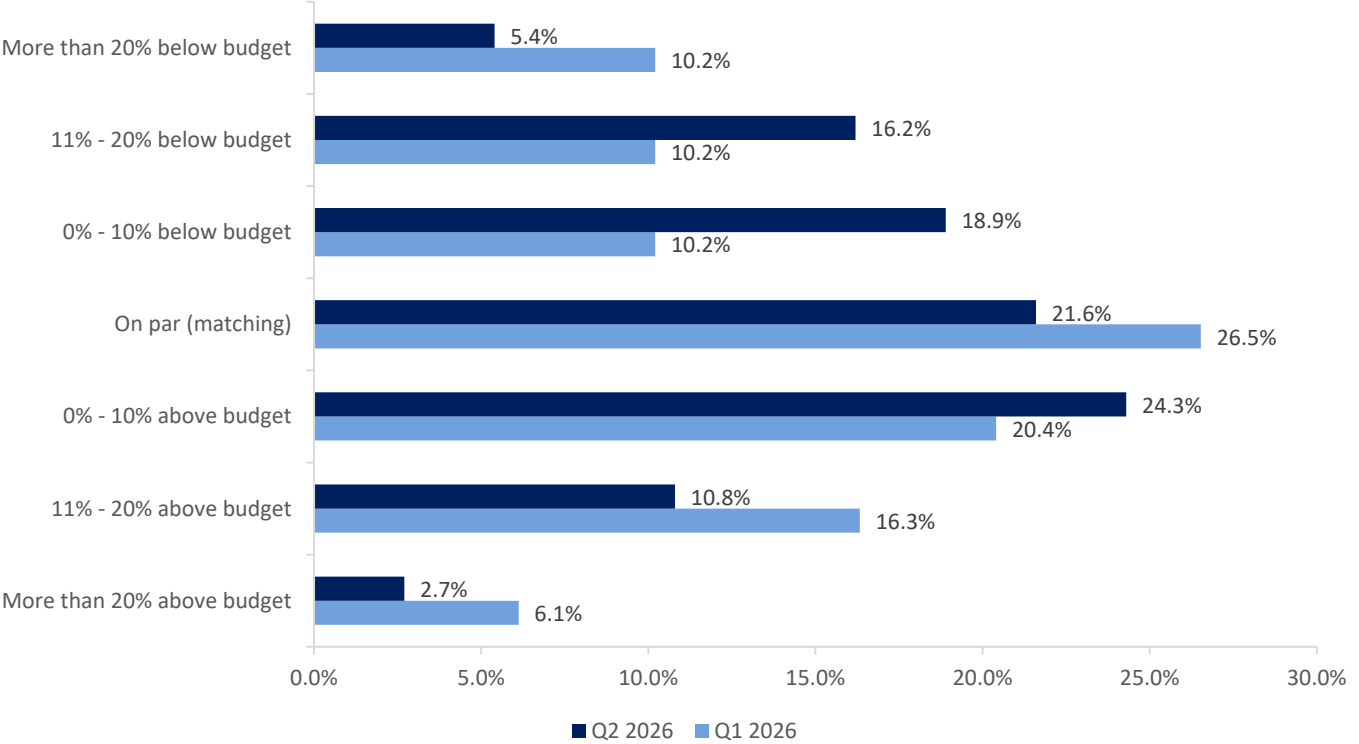
3. On average, by how much have your component prices increased since January 2025?



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	60.0%	33.3%	42.9%	100.0%	-	-
11% - 20% increase	-	55.6%	42.9%	-	100.0%	100.0%
21% - 30% increase	40.0%	11.1%	14.3%	-	-	-
31% - 40% increase	-	-	-	-	-	-
41% - 50% increase	-	-	-	-	-	-
Over 50% increase	-	-	-	-	-	-
Total	5	9	14	3	4	3

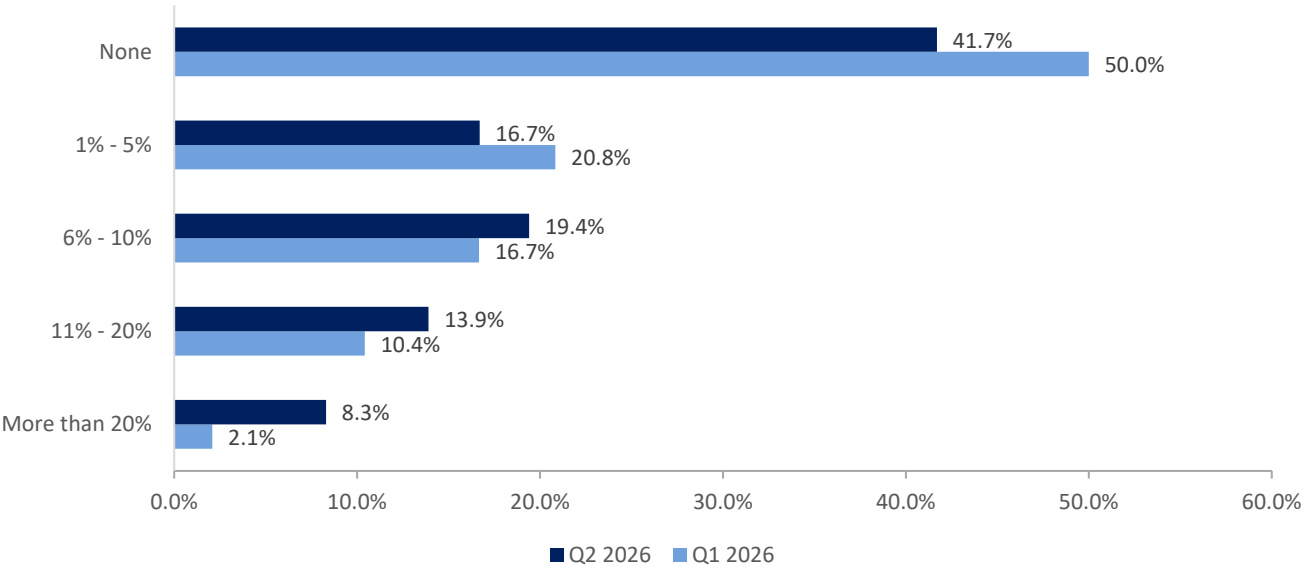
4. How do your actual year-to-date (YTD) sales compare to the same period last year? (Please select the option that best reflects your sales performance.)

Previous quarter: How were your 2025 sales compared to your 2024 sales?



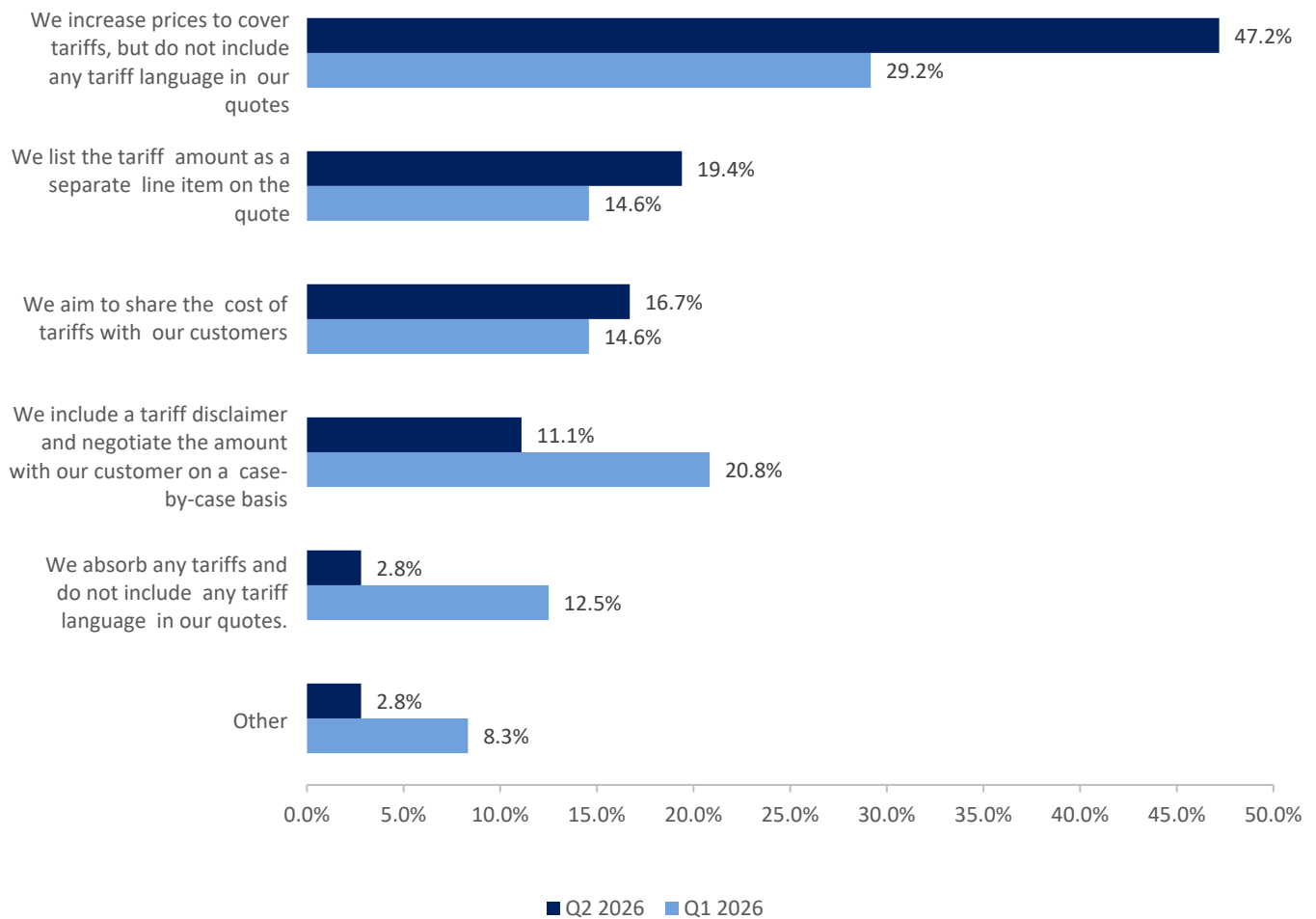
Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
More than 20% below	-	-	7.1%	-	25.0%	-
11% - 20% below	-	33.3%	7.1%	-	50.0%	-
0% - 10% below	25.0%	-	28.6%	-	25.0%	33.3%
On par (matching)	50.0%	22.2%	7.1%	66.7%	-	33.3%
0% - 10% above	-	33.3%	28.6%	33.3%	-	33.3%
11% - 20% above	25.0%	11.1%	14.3%	-	-	-
More than 20% above	-	-	7.1%	-	-	-
Total	4	9	14	3	4	3

5. 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	50.0%	55.6%	30.8%	66.7%	0.0%	66.7%
1% - 5%	-	11.1%	30.8%	0.0%	25.0%	-
6% - 10%	25.0%	11.1%	30.8%	33.3%	-	-
11% – 20%	-	22.2%	7.7%	-	25.0%	33.3%
More than 20%	25.0%	-	-	-	50.0%	-
Total	4	9	13	3	4	3

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



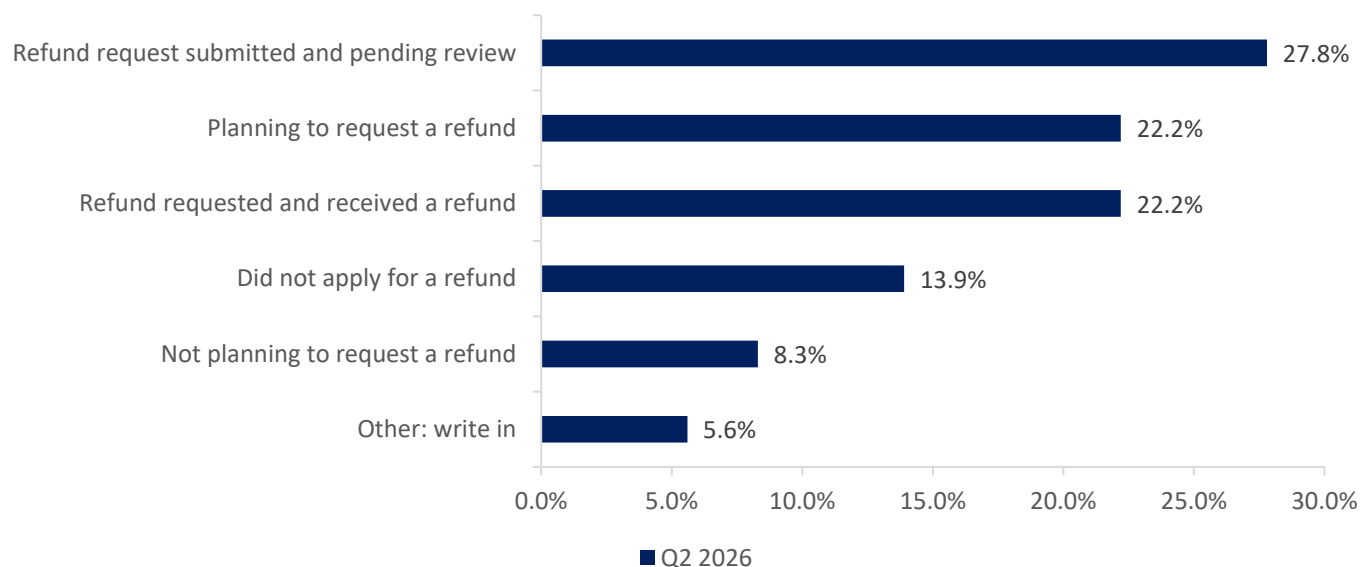
<i>Response Percentage by Revenue Range</i>						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
We increase prices to cover tariffs, but do not include any tariff language in our quotes	50.0%	62.5%	50.0%	33.3%	25.0%	33.3%
We list the tariff amount as a separate line item on the quote	25.0%	12.5%	14.3%	-	50.0%	-
We aim to share the cost of tariffs with our customers	-	12.5%	21.4%	33.3%	-	66.7%
We include a tariff disclaimer and negotiate the amount with our customer on a case-by-case basis	25.0%	-	7.1%	33.3%	25.0%	-
We absorb any tariffs and do not include any tariff language in our quotes.	-	-	7.1%	-	-	-
Other: write-in	-	12.5%	-	-	-	-
Total	4	8	14	3	4	3

Other: Write-in (by Revenue Range)

\$10 - \$19 Million

- Multiple ways as shown above.

7. Where are you in the process of requesting a tariff refund?



Response Percentage by Revenue Range						
	\$0 - \$9 Million	\$10 - \$19 Million	\$20 - \$49 Million	\$50 - \$99 Million	\$100 - \$249 Million	\$250 Million +
Refund request submitted and pending review	-	12.5%	42.9%	-	75.0%	-
Refund requested and received a refund	-	12.5%	21.4%	33.3%	25.0%	66.7%
Planning to request a refund	50.0%	-	28.6%	33.3%	-	33.3%
Did not apply for a refund	25.0%	25.0%	7.1%	33.3%	-	-
Not planning to request a refund	-	37.5%	-	-	-	-
Other: write in	25.0%	12.5%	-	-	-	-
Total	4	8	14	3	4	3

Other: Write-in (by Revenue Range)

\$0 - \$9 Million

- Canadian takes longer

\$10 - \$19 Million

- All refund requests submitted. Some refunds received.

8. Any additional comments on navigating tariffs?

Responses by Revenue Range

\$20 - \$49 Million

- This instability in the market negatively affects business
- It's a very complex and difficult process

\$50 - \$99 Million

- Initially, there was a disruption, however this worked itself out, early.



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