NOVEMBER 2026

QUICKIE SURVEY

2026 Q3 Tariffs









PMMI Business Intelligence

pmmi.org

2026 Q3 Tariffs
Quickie Survey Results
November 2026

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

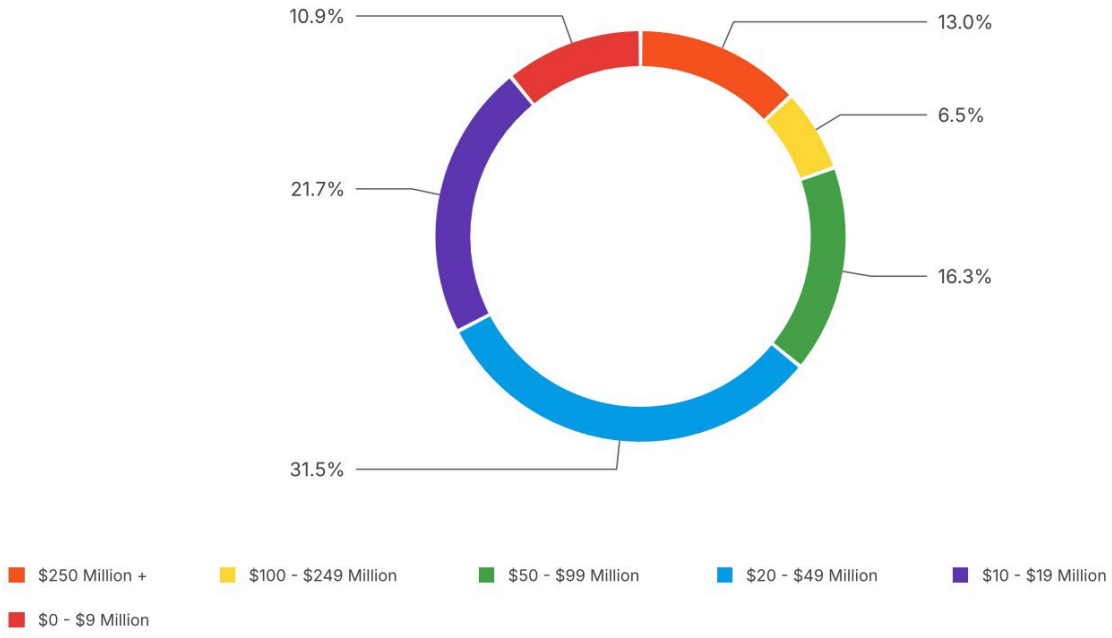
Respondents = 92

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.

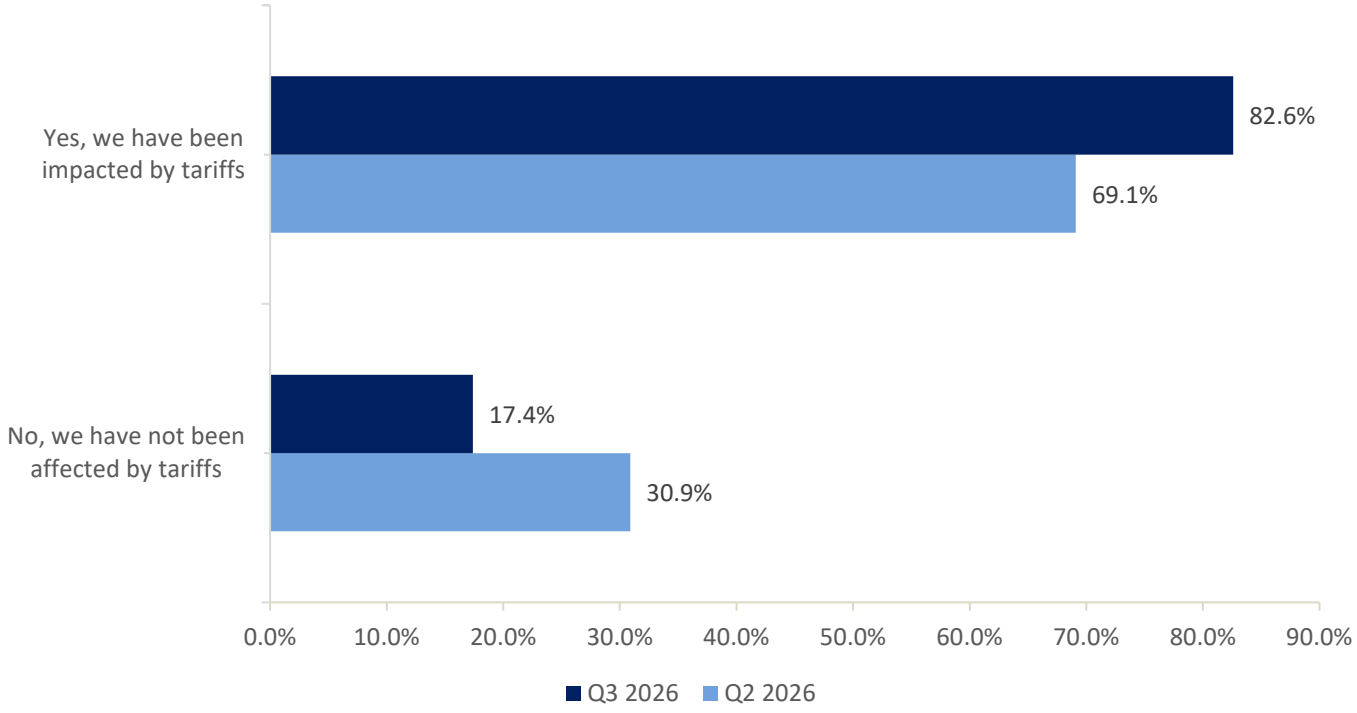
The share of respondents reporting a tariff impact climbed back up this quarter, from 69.1% to 82.6%. The most common ways tariffs are impacting businesses include increased cost of procurement for imported parts (86.8%), increased cost of procurement for domestic parts (50.0%), and price increases for domestic customers (CPGs) (48.7%). More than half of respondents in Q3 (54.1%) have seen an 11%-20% increase in component prices since January 2025. Refund activity continues to move forward, with 31.5% having already received a refund, up from 22.2% last quarter, and another 17.8% waiting on a submitted request.

Annual Revenue



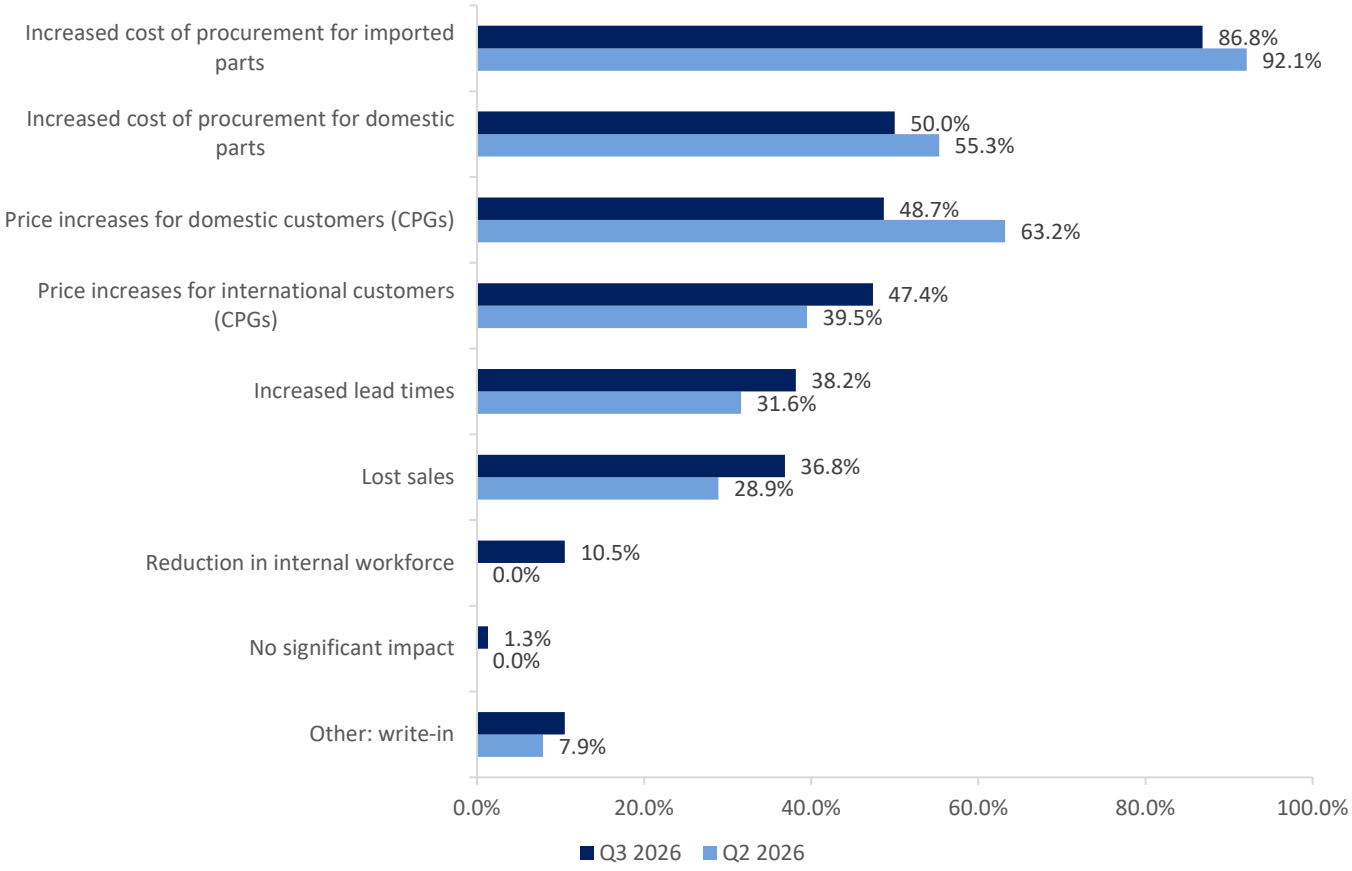
	Total	$0 - $9 Million	$10 - $19 Million	$20 - $49 Million	$50 - $99 Million	$100 - $249 Million	$250 Million +
Number of Respondents	92	10	20	29	15	6	12

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	70.0%	90.0%	79.3%	80.0%	66.7%	100.0%
No, we have not been affected by tariffs	30.0%	10.0%	20.7%	20.0%	33.3%	-
Total	10	20	29	15	6	12

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	100.0%	100.0%	69.6%	91.7%	100.0%	83.3%
Increased cost of procurement for domestic parts	57.1%	50.0%	34.8%	58.3%	100.0%	50.0%
Price increases for domestic customers (CPGs)	28.6%	50.0%	39.1%	41.7%	75.0%	75.0%
Price increases for international customers (CPGs)	42.9%	55.6%	34.8%	50.0%	75.0%	50.0%
Increased lead times	42.9%	38.9%	34.8%	33.3%	50.0%	41.7%
Lost sales	57.1%	38.9%	39.1%	16.7%	50.0%	33.3%
Reduction in internal workforce	14.3%	11.1%	13.0%	8.3%	-	8.3%
Other: write-in	-	22.2%	13.0%	8.3%	-	-
No significant impact	-	-	4.3%	-	-	-
Total	**7**	**18**	**23**	**12**	**4**	**12**

How to read this table: 100.0% of respondents in the $0 - $9 Million range selected "Increased cost of procurement for imported parts".

Other: Write-in (by Revenue Range)

$10 - $19 Million

- Delays in PO's
- Time between quotation and order has increased.
- Delayed shipments
- Tariff fees to the USA at time of shipment (which is not a price increase)

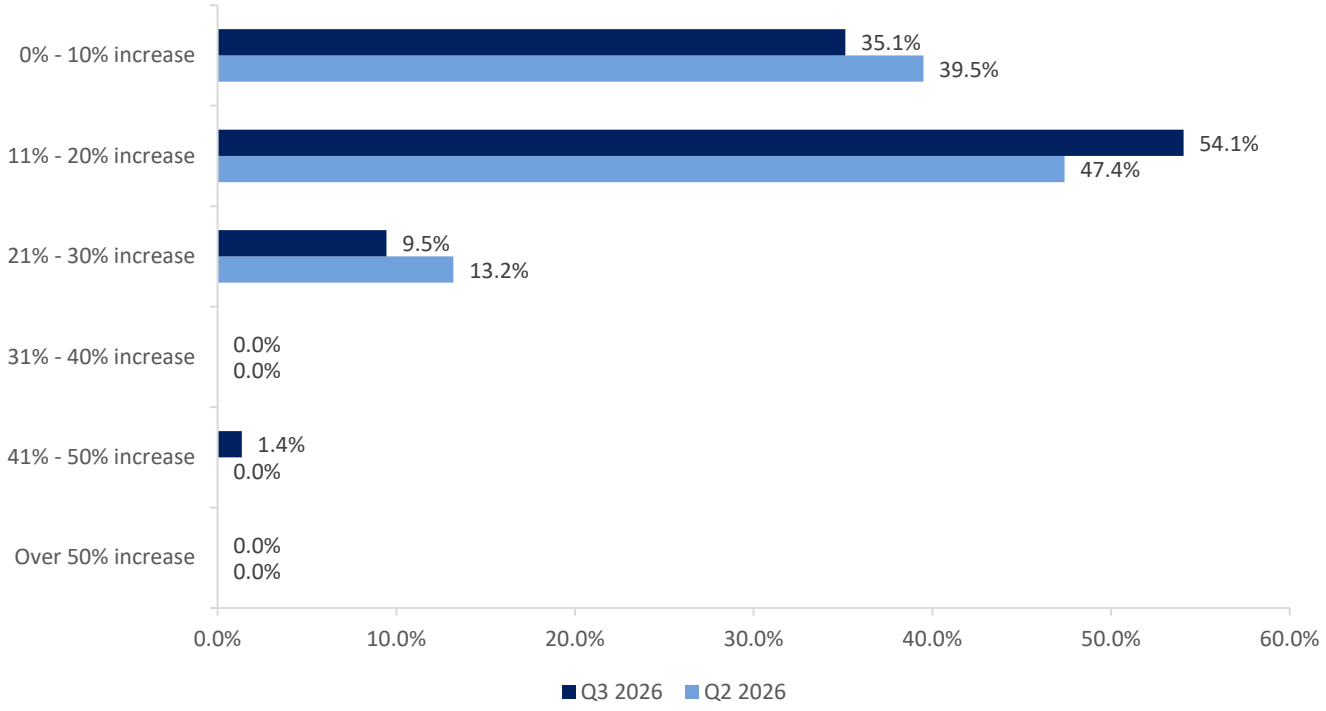
$20 - $49 Million

- Lost customers thinking that the tariffs are Canada's fault
- Shipping to USA customer issues
- Tariffs are just a part of doing business, but the environment changes so often at someone's whim, it just makes it confusing at times.

$50 - $99 Million

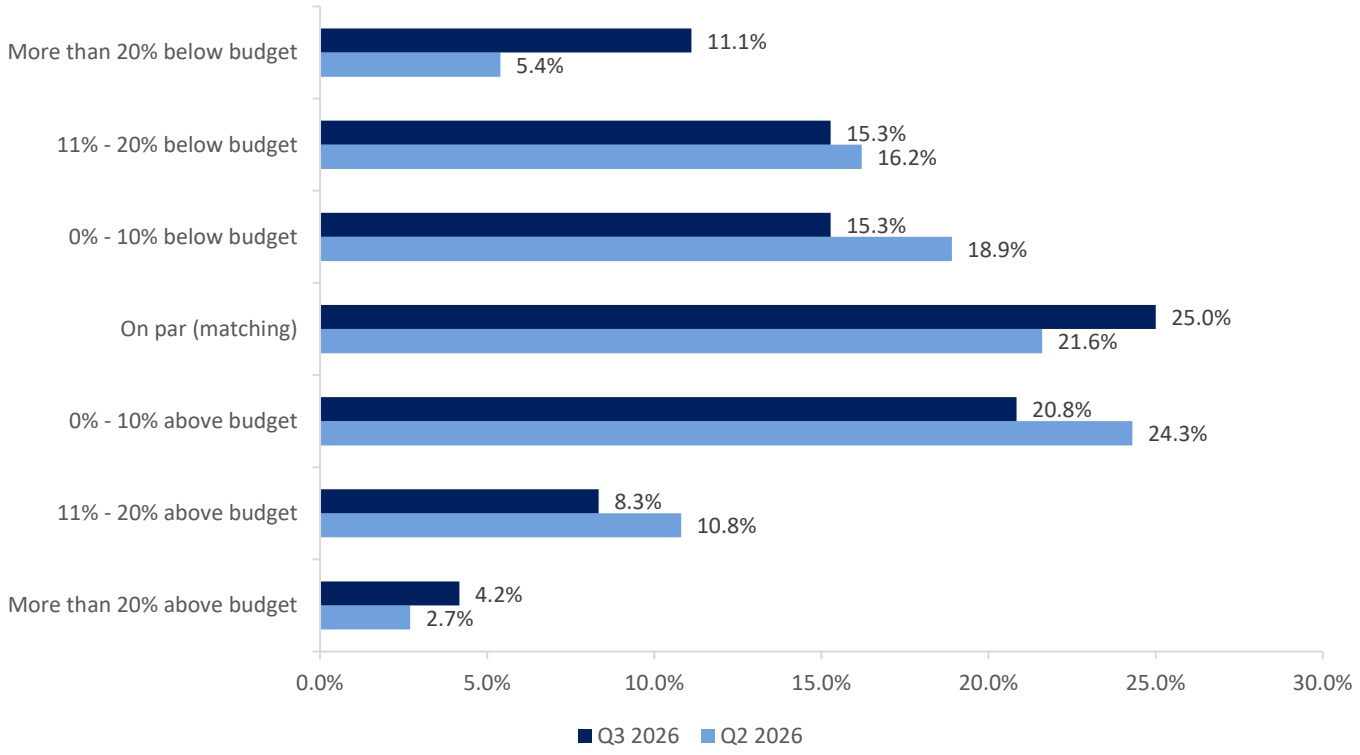
- Supply chain adjustments to customers outside of the USA

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



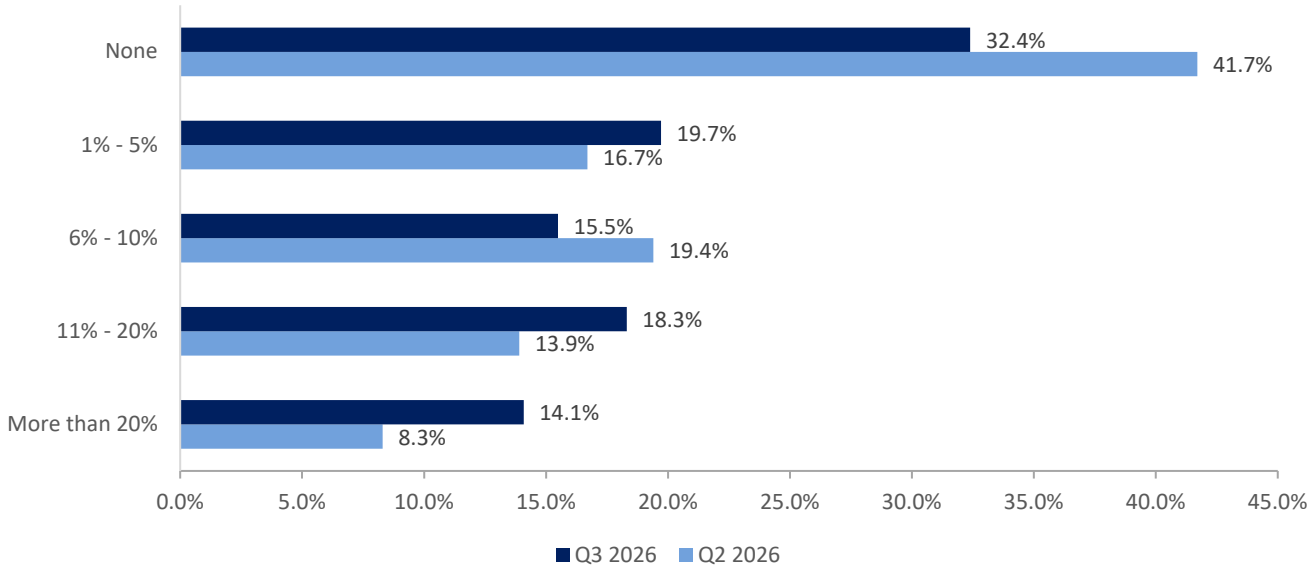
Response Percentage by Revenue Range						
	$0 - $9 Million	**$10 - $19 Million**	**$20 - $49 Million**	**$50 - $99 Million**	**$100 - $249 Million**	**$250 Million +**
0% - 10% increase	14.3%	41.2%	39.1%	33.3%	-	45.5%
11% - 20% increase	57.1%	41.2%	56.5%	50.0%	100.0%	54.5%
21% - 30% increase	28.6%	11.8%	4.3%	16.7%	-	-
31% - 40% increase	-	-	-	-	-	-
41% - 50% increase	-	5.9%	-	-	-	-
Over 50% increase	-	-	-	-	-	-
Total	**7**	**17**	**23**	**12**	**4**	**11**

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.)**



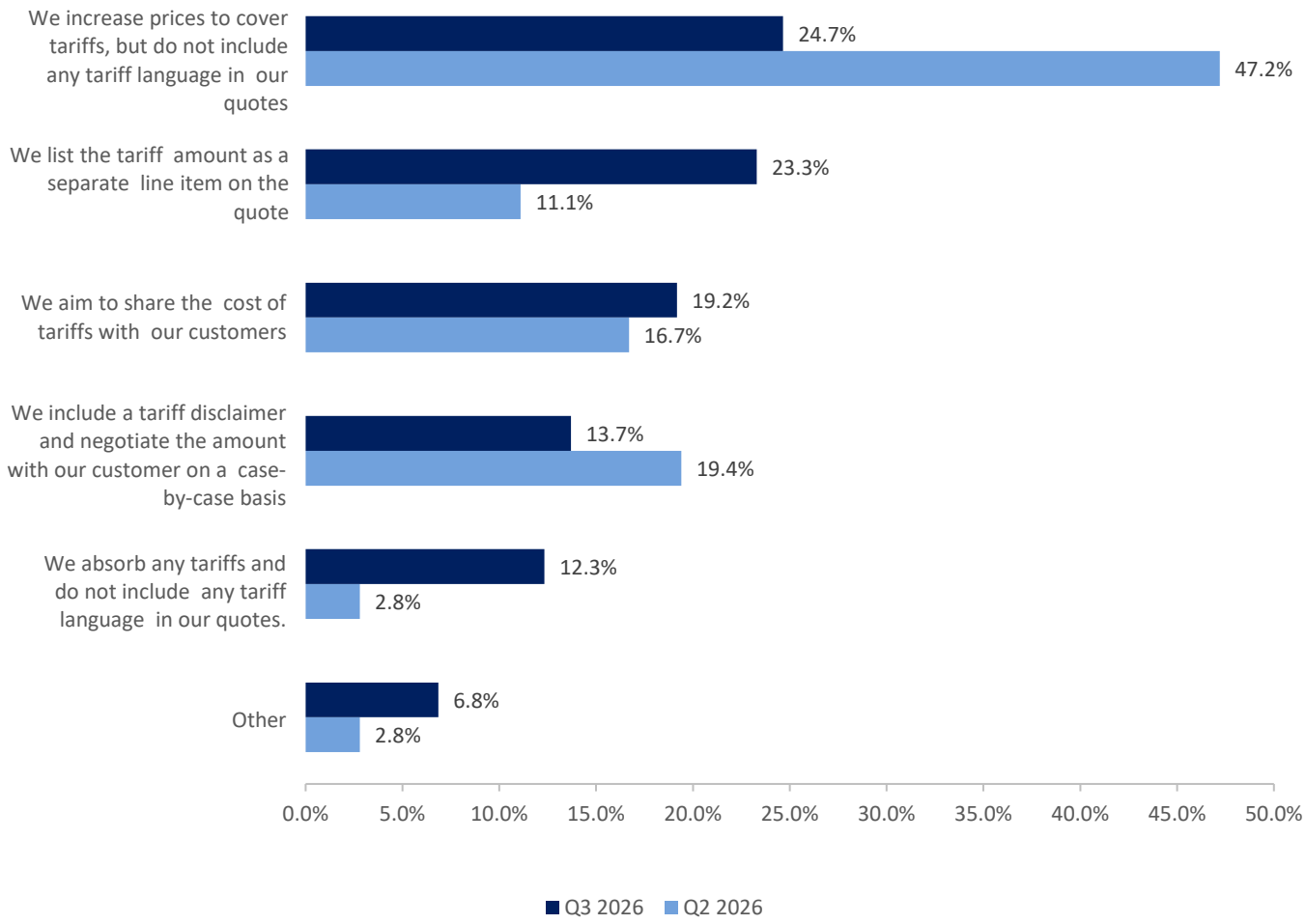
Response Percentage by Revenue Range						
	$0 - $9 Million	**$10 - $19 Million**	**$20 - $49 Million**	**$50 - $99 Million**	**$100 - $249 Million**	**$250 Million +**
More than 20% below	28.6%	5.9%	18.2%	-	-	10.0%
11% - 20% below	14.3%	23.5%	13.6%	16.7%	-	10.0%
0% - 10% below	14.3%	11.8%	18.2%	8.3%	50.0%	10.0%
On par (matching)	14.3%	17.6%	27.3%	25.0%	25.0%	40.0%
0% - 10% above	28.6%	17.6%	13.6%	41.7%	-	20.0%
11% - 20% above	-	11.8%	4.5%	8.3%	25.0%	10.0%
More than 20%	-	11.8%	4.5%	-	-	-
Total	**7**	**17**	**22**	**12**	**4**	**10**

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	28.6%	29.4%	40.9%	27.3%	50.0%	20.0%
1% - 5%	-	23.5%	18.2%	36.4%	25.0%	10.0%
6% - 10%	42.9%	17.6%	4.5%	18.2%	-	20.0%
11% – 20%	-	23.5%	18.2%	9.1%	-	40.0%
More than 20%	28.6%	5.9%	18.2%	9.1%	25.0%	10.0%
Total	**7**	**17**	**22**	**11**	**4**	**10**

6. 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 increase prices to cover tariffs, but do not include any tariff language in our quotes	28.6%	23.5%	21.7%	33.3%	25.0%	20.0%
We list the tariff amount as a separate line item on the quote	28.6%	17.6%	13.0%	8.3%	50.0%	30.0%
We aim to share the cost of tariffs with our customers	-	11.8%	21.7%	16.7%	-	10.0%
We include a tariff disclaimer and negotiate the amount with our customer on a case-by-case basis	28.6%	5.9%	30.4%	25.0%	25.0%	30.0%
We absorb any tariffs and do not include any tariff language in our quotes.	14.3%	17.6%	8.7%	16.7%	-	10.0%
Other: write-in	-	23.5%	4.3%	-	-	-
Total	**7**	**17**	**23**	**12**	**4**	**10**

Other: Write-in (by Revenue Range)

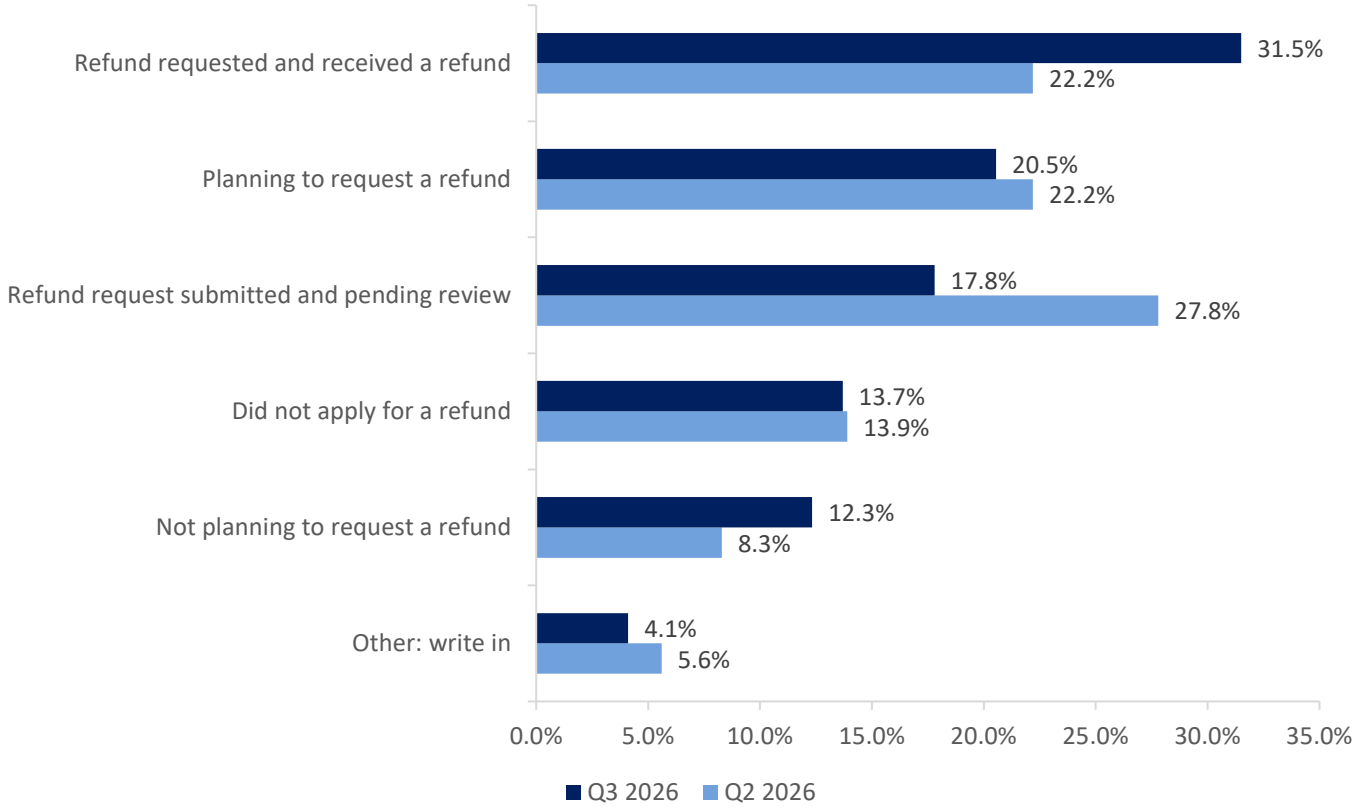
$10 - $19 Million

- Also increase due tariffs
- Multiple above actions
- All of the above
- Multiple lines apply - tariffs are paid by the importer of record. Reimbursement for tariffs can be managed in a variety of ways depending on customer relationship and overall strategy for repeat business

$20 - $49 Million

- We ship everything via INCO terms FCA and the customer pays tariffs

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 requested and received a refund	-	23.5%	34.8%	41.7%	50.0%	40.0%
Planning to request a refund	28.6%	5.9%	21.7%	16.7%	25.0%	40.0%
Refund request submitted and pending review	14.3%	-	26.1%	25.0%	25.0%	20.0%
Did not apply for a refund	28.6%	41.2%	-	8.3%	-	-
Not planning to request a refund	28.6%	17.6%	13.0%	8.3%	-	-
Other: write in	-	11.8%	4.3%	-	-	-
Total	**7**	**17**	**23**	**12**	**4**	**10**

Other: Write-in (by Revenue Range)

$10 - $19 Million

- Partial refunds received
- We manage based on government support programs and refund applicability rules. where possible we look to mitigate the tariff amounts

8. **Any additional comments on navigating tariffs?**
   Responses by Revenue Range

$10 - $19 Million

- Completely a terrible idea from this guy. Messed with the entire supply chain and long term relationships we had. Very hard to calculate what the actual cost that we beared from these tariffs.
- Generally speaking tariffs have been very difficult for Canadian businesses to navigate. The section 338 tariff in particular has hit some products with applicable HTS codes with a 50% tariff without any real explanation on why. Our products are USMCA compliant and we continue to navigate the current situation with exploring many options to maintain our US business.
- It's not the cost of tariffs that are troubling. It is how they are implemented as a political tool
- Tariffs are not what is affecting business, market uncertainty is what is affecting business. When a company has no confidence in where they will sell their products, they stop buying machines to make more products.

$20 - $49 Million

- A total waste of time and money.
- Continued uncertainty is harmful for planning.
- We've largely avoided these by being a US manufacturer with US distribution.

$50 - $99 Million

- I believe that PMMI should use its financial standing and influence to start a Hill Day visit and a PAC

$100 - $249 Million

- While tariffs are still a topic of discussion with customers, they have not significantly affected customer decisions or our order entry process. They are now a standard part of conversations.

$250 Million +

- Tariffs have made investment in USA production facilities a reality. Components from outside the USA have increase our costs.
- We are Canadian and these tariffs have been a nightmare, a pain, additional unnecessary costs for all creating inflation. We are all paying for them at the end.

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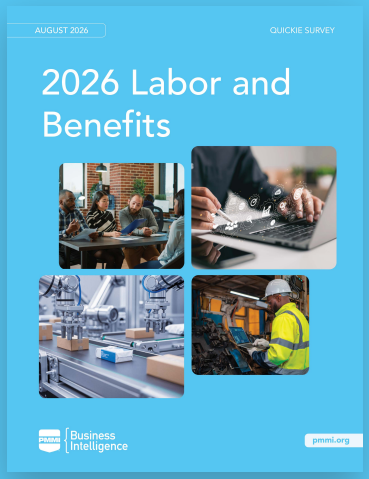
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