



LogicSource®

MARCH UPDATE:

LOGICSOURCE 2026

TARIFF IMPACT ANALYSIS

Produced by LogicSource Indirect Category Leaders and Center of Excellence

This report leverages insights from 200+ indirect category experts and \$200B+ in pricing data to provide actionable strategies for optimizing procurement, mitigating risks, and addressing the impacts of tariffs and trade regulations.

Learn more at [logicsource.com](https://www.logicsource.com)

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EXECUTIVE SUMMARY

In late February 2026, the U.S. Supreme Court dealt a major setback to President Trump's tariff agenda by ruling that his broad import tariffs, originally justified under the International Emergency Economic Powers Act (IEEPA), were unlawful because that law does not authorize the President to impose broad tariffs. The Court's 6-3 decision held that setting tariffs is a power reserved for Congress and not the executive under IEEPA, invalidating a large portion of Trump's sweeping global tariffs that had been in place.

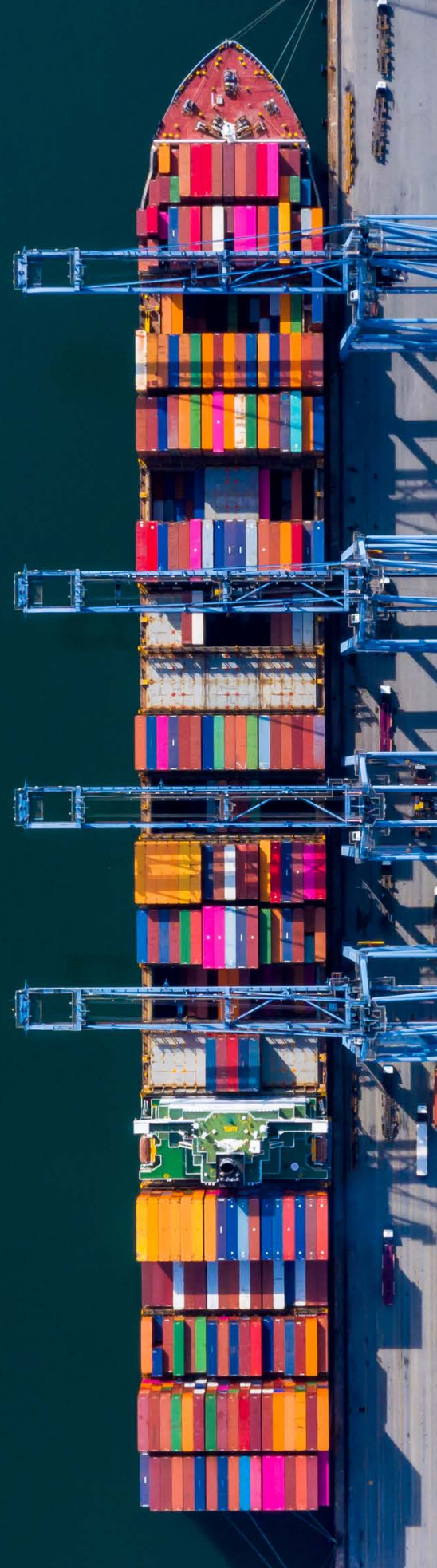
Almost immediately after the ruling, President Trump moved to preserve his policy goals by shifting legal authority: he signed an executive order imposing a new global tariff, initially set at 10% and quickly raised to 15%, using Section 122 of the Trade Act of 1974, a statute that allows temporary tariffs for up to 150 days to address serious trade imbalances.

Rather than backing down, Trump has framed this shift as a reaffirmation of his trade strategy and has warned trading partners that countries must still honor tariff agreements or face even higher duties.

Despite this highly volatile tariff environment and the broad cost pressures businesses have faced over the past year, LogicSource's procurement solution has demonstrated that the right combination of market intelligence, benchmarking data, subject matter expertise, and disciplined tariff mitigation strategies can outperform market headwinds. In 2024, LogicSource delivered 107% of the savings plan across our client base, and in 2025, improved that performance to 113% of the plan. These results reinforce that while tariffs present a significant challenge, proactive and strategic sourcing can continue to drive measurable cost reductions across the enterprise.

This March 2026 report serves as a critical update to LogicSource's original 2025 **Tariff Impact Analysis**, breaking down every major tariff action and notice issued, highlighting where costs are climbing and which categories are most exposed. It equips procurement and supply chain leaders with the critical insights needed to refine their sourcing strategies, pricing models, and risk mitigation plans in response to these evolving trade policies.

Visit our **Tariff Report Library** to stay current on quarterly tariff analysis updates, explore detailed category breakdowns, and discover real-world applications of tariff mitigation strategies.



SUPREME COURT DECISION OUTCOMES

What the Supreme Court Decision Actually Did

The Supreme Court's ruling was narrow but highly consequential. The Court did not eliminate all Trump-era tariffs. Instead, it ruled that the President cannot use the International Emergency Economic Powers Act (IEEPA) to impose broad, across-the-board tariffs. In short, IEEPA allows sanctions and asset controls, but not general import taxes.

Tariffs That Were Invalidated

The decision effectively struck down tariffs that were imposed under IEEPA authority, including:

- + The broad global baseline tariff (10%) is applied across most imports
- + The higher "reciprocal" tariffs that escalated rates on select countries (e.g., China, Mexico, Canada)
- + Certain country-specific emergency tariffs are tied to geopolitical disputes

Tariffs That Remain in Effect

Importantly, tariffs imposed under other trade statutes remain intact, including Section 232 tariffs - National Security (e.g., steel, aluminum, copper, automobiles, lumber, etc.).

Because these statutes explicitly grant tariff authority, they were not affected by the Court's ruling.

Trump Administration Response

The ruling removed the administration's ability to quickly impose sweeping global tariffs under emergency powers. However, within days, President Trump responded by invoking Section 122 of the Trade Act of 1974, implementing a temporary 10% tariff (later increased to 15%) for up to 150 days (ending on July 24, 2026) while pursuing longer-term options.

The result is not the end of tariffs, but a shift in legal strategy and structure, creating a new layer of policy uncertainty for businesses and trading partners.

Tariff Refund Potential

Although the recent Supreme Court ruling did not provide direction on refund procedures, the invalidation of certain emergency tariffs may create opportunities for duty recovery. Senate Democrats have introduced the “Tariff Refund Act of 2026,” which would require U.S. Customs and Border Protection (CBP) to expedite refunds and prioritize small businesses; however, it remains uncertain whether the bill will advance.

In addition to this bill, a federal trade judge ruled that the U.S. government must begin refunding the more than \$130 billion in tariffs already collected, directing U.S. Customs and Border Protection to calculate repayments (with interest) to affected importers, though the administration is expected to appeal, and the actual refund process could take significant time.

In the meantime, companies are awaiting formal CBP guidance on the refund process, but should begin preparing documentation and reviewing exposure now.

Supplier Refund/ Rebate Strategy



- + If suppliers passed through tariff surcharges, review contracts and invoices to determine what was collected and under what authority.
- + Where tariffs have been invalidated or reduced, engage suppliers to reconcile amounts paid versus duties legally owed.
- + Recovery may take the form of credits, rebates, or forward-looking price reductions.
- + Going forward, tariff charges should be structured as variable line items tied to actual duty rates, not embedded permanently in pricing.

CBP Refund Process (Importer of Record)



- + If your organization paid tariffs directly to Customs, recovery will depend on entry status and upcoming CBP instructions.
- + Potential paths may include Post Summary Corrections (before liquidation) or formal Protests (within 180 days of liquidation).
- + Companies should immediately review affected entries, confirm liquidation status, and preserve filing deadlines while awaiting official guidance.

Tariff refunds may become a meaningful working capital opportunity, but action and documentation discipline will be critical.

SCENARIO PLANNING: WHAT IS LIKELY TO HAPPEN NEXT

With the Supreme Court ruling limiting the use of emergency tariff authority and the administration shifting to a temporary 10%-15% tariff under Section 122, the tariff landscape is unlikely to stabilize quickly. Instead, we expect continued policy maneuvering and elevated uncertainty through 2026. Below are the most plausible scenarios organizations should plan for.



SCENARIO 1 Temporary Tariffs Expire or Are Reduced

Section 122 tariffs are time-bound (up to 150 days unless extended by Congress). If economic pressure builds or legal challenges intensify, the administration could allow the temporary tariff to lapse or scale it back.

Implication ▼

Modest easing of landed costs, but continued volatility as suppliers hesitate to reduce pricing immediately.



SCENARIO 2 Expansion Through Traditional Trade Authorities

The administration may shift toward broader use of Section 232 (national security) or Section 301 (unfair trade practices) to reimpose or expand tariffs on targeted sectors.

Implication ▼

Category-specific exposure increases (e.g., electronics, pharmaceuticals, metals, industrial inputs).



SCENARIO 3 Congressional Involvement

Congress could act to either limit executive tariff authority further or codify certain tariff structures. Given political dynamics, this could either constrain or reinforce tariff policy.

Implication ▼

Greater structural clarity, but potentially longer-term embedded tariffs.

What Is Most Likely?

The most probable near-term outcome is continued use of targeted tariffs under more defensible statutes, combined with periodic adjustments rather than sweeping global actions. Businesses should expect:

- + Shorter supplier quote validity periods
- + Ongoing attempts to pass through tariff-related costs
- + More category-specific tariffs are applicable globally
- + Continued volatility in globally sourced categories

While broad emergency tariffs have been curtailed, tariffs remain a central economic and geopolitical lever.



CURRENT TARIFF LANDSCAPE

The table below summarizes the major tariffs currently in effect:

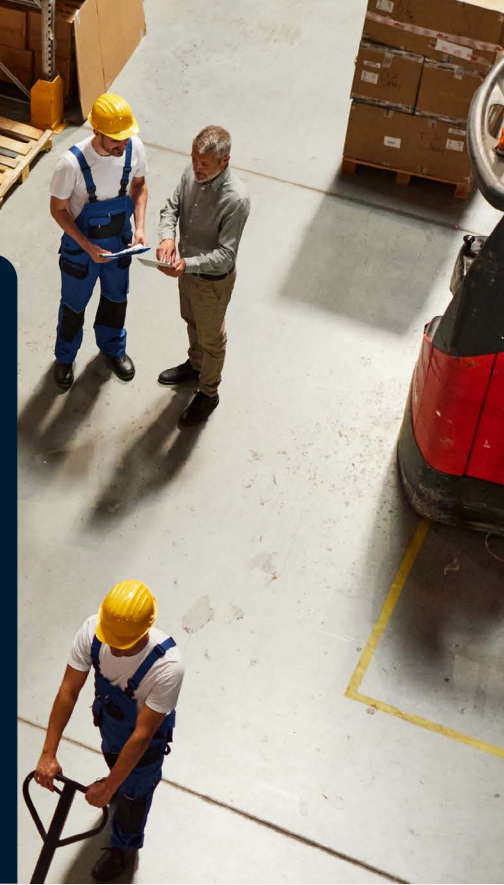
Country/Region	Effective Date	Tariff Rate	Notes or Exemptions
All Countries (Section 122)	February 24, 2026	10% (Likely increase to 15%)	Expiring July 24, 2026
Steel & Aluminum	June 4, 2025 (Raised)	50% (Increased from 25%)	<ul style="list-style-type: none"> UK-origin at 25% Russia-origin aluminum at 200%
Autos & Auto Parts	April 3, 2025 (Autos) May 3, 2025 (Auto Parts)	25%	<ul style="list-style-type: none"> UK-origin auto parts at 10% Modified rates for EU/ Japan/South Korea
Copper	August 1, 2025	50%	N/A
Lumber / Timber	October 14, 2025	10% - Softwood 25% - Wooden Furniture (Increasing to 30% on January 1, 2027) 25% - Kitchen Cabinets (Increasing to 50% on January 1, 2027)	Wooden Furniture and Kitchen Cabinets: <ul style="list-style-type: none"> UK-origin at 10% Modified rates for EU/ Japan/South Korea

Country/Region	Effective Date	Tariff Rate	Notes or Exemptions
Truck & Truck Parts	November 1, 2025	25% Medium/Heavy Duty Vehicles and Parts 10% - Buses	N/A
Maritime Cargo Handling Equipment (Chassis/Gantry Cranes)	Delayed until November 10, 2026	100%	N/A
Semiconductors (Logic Integrated Circuit only)	January 15, 2026	25%	Exempted for use in US Data Centers, repair/replacement performed in US, R&D in US, Startups, consumer electronic applications in US, civil industrial applications in US, and US public sector applications

While the transshipment penalty of 40% was deemed invalid by the Supreme Court, the de minimis exemption remains suspended.

CONTINUED TARIFF IMPACTS ON INDIRECT SPEND

The removal of country-specific tariffs should help ease cost pressure across many indirect spend categories. While tariffs have not disappeared entirely, rates that were previously as high as 30% on China-origin goods under the emergency framework are now effectively reduced to the new 10%-15% temporary tariff level, lowering the incremental duty burden. The reduction in country-specific surcharges should moderate landed costs, reduce supplier risk premiums embedded in bids, and improve pricing stability for upcoming purchases.



FACILITIES, CONSTRUCTION & FF&E



Steel and aluminum tariffs remain elevated at 50%, continuing to drive cost pressure across mechanical, electrical, and structural components. Copper pricing remains volatile due to both tariff exposure and geopolitical supply concerns.

FF&E sourced from Asia has previously been impacted by country-specific tariffs, which are now invalid.

Through recent LogicSource sourcing activity, we are observing:

- + Price holds increasing to 60-90 days (previously 30 to 60 days)
- + HVAC and electrical equipment price increases are subsiding compared to late 2025
- + Furniture and millwork suppliers are passing through 6%-15% surcharges, particularly on metal-intensive SKUs
- + Increased “tariff-risk buffers” embedded in lump-sum project bids



LogicSource Mitigation Strategies

Aggregating demand through bulk buys, securing longer-term agreements with escalation caps, redesigning specifications to lower exposure, and rigorously auditing tariff pass-through charges through targeted supplier questioning (outlined in the tariff mitigation strategy section below).

IT HARDWARE & ELECTRONICS



IT hardware and electronics continue to experience significant cost pressure driven by AI/data center demand, RAM shortages, and tariff volatility. While RAM shortages and AI-related capacity constraints are the primary drivers of pricing spikes, tariffs are adding incremental cost and commercial instability.

Recent market impacts include:

- + Planned ~25%–35% increase in data storage and servers, and 15%–25% increase in all other IT hardware by April
- + Quote validity reduced to ~15 days from the historical 30+ days.
- + Continued lead-time volatility as OEMs diversify assembly to Mexico and Vietnam



LogicSource Mitigation Strategies

Extending refresh cycles, prioritizing near-shore/U.S. assembly providers, negotiating multi-year pricing protections, and validating tariff applicability by SKU-level HTS codes.

PRINT & PACKAGING



Paper and pulp markets remain sensitive to North American trade policy, while aluminum tariffs (50%) continue to pressure cans, foils, and specialty packaging.

Although no broad new packaging tariffs were implemented during this period, the January–February geopolitical tariff threats (Europe, Cuba oil suppliers) increased commodity volatility and transportation costs.

Recent sourcing observations:

- + 3%–6% average cost inflation across print and packaging (stable but elevated)
- + Recent price increases were announced for Corrugate, as early as March 1st (\$30 to \$70 increase/ton)
- + Aluminum packaging SKUs are experiencing renewed volatility



LogicSource Mitigation Strategies

Consolidating vendors, expanding domestic converters, redesigning specifications to reduce aluminum intensity, and increasing use of digital/demand-based print runs.

TRANSPORTATION & LOGISTICS



Recent tariff announcements, along with the Supreme Court ruling and the administration's rapid shift to a new 10%-15% temporary tariff, have injected renewed volatility into distribution and logistics markets. Even though some country-specific tariffs were removed, the speed of policy changes has disrupted forecasting, routing decisions, and rate stability.

Recent sourcing observations:

- + 50% steel/aluminum tariffs increase the costs of trailers, containers, and repair parts
- + Ocean spot rates are trending down, after a temporary uptick in December
- + Ocean carriers attempted to generate rate increases in January, with little success
- + Truckload rates are likely to increase 2%-5% due to steady demand and reduced capacity
- + Less-than-Truckload expects mid-single-digit rate increases, in line with long-term LTL PPI trends, though shippers with uneven demand may see greater cost volatility.



LogicSource Mitigation Strategies

Deploying competitive RFPs, multi-year agreements with indexed fuel caps, alternative routing analysis, and spot vs. contract optimization.

UTILITIES



Recent tariff changes and ongoing trade uncertainty continue to place upward pressure on utility and energy-related costs. While the Supreme Court ruling removed certain country-specific tariffs, key structural tariffs, particularly the 50% steel and aluminum duties under Section 232, remain in place and continue to impact infrastructure, generation, and transmission investments.

Projected 2026 impacts remain consistent with late-2025 forecasts:

- + Electricity up ~3%-5%
- + Water up ~3%-5%
- + Natural gas up ~15%-17%
- + Blended total utility cost increase ~5%-7%



LogicSource Mitigation Strategies

Leveraging energy brokers in deregulated markets, securing long-term fixed-rate contracts, and accelerating efficiency initiatives (LED, HVAC optimization, demand-response programs).

TARIFF IMPACT ON THE ECONOMY

The U.S. economy continues to show signs of tariff-related impact on growth, prices, trade flows, and household purchasing power as tariff policies introduced in 2025 persist and expand into 2026. According to The Budget Lab at Yale, all tariffs enacted in 2025 are now estimated to reduce real U.S. GDP growth by about 0.4 percentage points in 2026, even after excluding later proposed tariffs that were never implemented. This downward pressure occurs through higher import costs, reduced purchasing power, and disrupted supply chains.

Key economic indicators reflect these trends and the broader macroeconomic environment:



Trade Deficit

In 2025, the U.S. trade deficit remained large, with the goods deficit hitting a near-record ~\$1.2 trillion despite tariffs, showing that tariffs have not reversed the trade imbalance as intended.



Inflation

Consumer price inflation has moderated, with CPI at ~2.4% in January 2026, down from late-2025 readings and near Federal Reserve targets of 2%. Core inflation remains modest, suggesting tariff pass-through to consumer prices is real but not runaway.



Import Prices

Import prices remain elevated relative to pre-tariff baselines, with evidence of partial pass-through into core goods prices.



Household Impact

Average households faced a loss of purchasing power from tariffs in 2025 (some studies estimate \$1,000 to \$1,700 per household).

The recent Supreme Court ruling and subsequent shift to a temporary 10%-15% tariff structure reduce some of the most aggressive country-specific duties, which may modestly ease near-term cost pressures; however, continued policy uncertainty and elevated baseline tariffs are likely to sustain business caution, supply chain volatility, and incremental drag on investment and growth.



TARIFF MITIGATION STRATEGIES

As tariff policies continue to expand, companies need to take proactive measures to limit exposure and control rising costs. The strategies below are designed to help organizations identify risk, safeguard margins, and strengthen their negotiation position.

CONDUCT A COMPREHENSIVE RISK ASSESSMENT

01

- + Model various tariff scenarios to understand sourcing cost implications and identify high-risk countries, categories, and suppliers.
- + Focus mitigation efforts on high-spend or high-risk categories with significant exposure to steel, aluminum, and copper, and imports from countries like Canada, Mexico, China, and India.

STRENGTHEN SUPPLIER NEGOTIATIONS

02

- + Involve Procurement early to challenge tariff-related price increases by requiring suppliers to provide detailed evidence of actual tariff costs.
- + Enforce fixed-price contract terms where applicable, and set the expectation that suppliers pursue their own mitigation strategies, such as alternative sourcing or upstream renegotiations.
- + Where necessary, require suppliers to absorb a significant share of the tariff (50% to 100% is often achievable), delay increases for a defined period (e.g., six months), or agree to price caps to guard against inflation.

DIVERSIFY YOUR SOURCING BASE

03

- + Identify and qualify alternative suppliers that operate in countries less affected by current or anticipated tariffs.
- + Work with existing suppliers to explore their ability to shift production or sourcing to lower-tariff regions.

ADJUST PRODUCT SPECIFICATIONS

04

- + Reassess product requirements to identify opportunities to use more cost-effective materials or domestically sourced alternatives.
- + Adjusting specifications can reduce dependency on tariff-heavy components without compromising performance.

REQUIRE ITEMIZED INVOICES

05

- + Ensure that suppliers provide fully itemized invoices, especially for Cost, Insurance, and Freight (CIF) charges.
- + Tariffs should not be applied to freight or insurance costs; without itemization, importers risk overpaying tariffs on the total invoice value.

SEPARATE TARIFF CHARGES FROM UNIT PRICING

06

- + Require all quotes, contracts, and statements of work (SOWs) to list tariff fees separately from base pricing.
- + This improves transparency and ensures tariff-related charges can be removed or adjusted independently if policies change, preventing suppliers from permanently baking in those increases.

STAY INFORMED AND ANTICIPATE POLICY SHIFTS

07

- + Tariff policy remains highly fluid, with ongoing discussions around new product-specific tariffs.
- + Staying informed allows Procurement and Finance teams to anticipate changes, update cost models, and act before impacts materialize.

TARIFF-FOCUSED CASE STUDIES

LogicSource has actively applied the tariff mitigation strategies outlined above to help clients minimize significant tariff-driven price increases. Below are examples demonstrating how these strategies translate into measurable, real-world outcomes.

CASE STUDY 1 Retail - Bulk Buy



The Challenge

Client accelerated purchase of store fixtures for a bulk buy and consolidated orders across several locations into a single production run.

The LogicSource Solution

- + Locked in pricing, secured production capacity, and imported the inventory ahead of anticipated tariff increases and rate uncertainty.
- + Store opening costs related to fixturing were largely unaffected by subsequent tariff changes.

The Result

Client avoided incremental duties that later impacted similar China-origin fixtures.

CASE STUDY 2 Healthcare - CPI Justification



The Challenge

Client faced 7%-10% tariff-driven increases across linen/textiles/uniforms and surgical services equipment.

The LogicSource Solution

- + Reduced the proposed increase by requiring detailed transparency into the supplier's tariff cost methodology, information that the supplier was unwilling to fully disclose.
- + We settled at a nominal <3% increase by replacing blanket tariff pass-throughs with a structured 3-year CPI-based agreement.

The Result

For a not-for-profit health system operating under fixed reimbursement, this preserved cost predictability and avoided absorbing the full proposed increase.

CASE STUDY 3

Managed Print Services - Alternative Sourcing



The Challenge

Incumbent supplier implemented a 5% increase to the base fee and a 15% increase to the cost per print, stating the adjustments were non-negotiable due to a companywide rollout.

The LogicSource Solution

- + Challenged the increase, communicating that the magnitude would trigger a competitive evaluation.
- + Required detailed justification tying the increases directly to tariff exposure (e.g., toner manufactured in China and subject to import duties) and made clear that any tariff-related adjustments should be treated as variable, not permanent, costs that decrease if tariffs decline.

The Result

Although the supplier substantiated portions of the increase, we ultimately sourced an alternative provider with different supply channels that delivered equivalent services at 10% lower total cost.

CASE STUDY 4

Tariff-Sharing



The Challenge

A paper bag supplier attempted to implement a direct pass-through of a 50% tariff cost increase.

The LogicSource Solution

- + Conducted competitive benchmarking and signaled readiness to launch an RFP.
- + Faced with credible market alternatives, the incumbent agreed to absorb half of the tariff impact, effectively splitting the cost rather than passing it through entirely.

The Result

This approach avoided a full rebid while delivering immediate savings and reinforcing that tariff-related increases must withstand competitive scrutiny.

PROCUREMENT PLAYBOOK: QUESTIONS TO ASK

With tariff policy shifting and suppliers frequently citing trade impacts as justification for price increases, procurement teams must move from reactive acceptance to structured validation.

Below are key questions to deploy immediately during negotiations:

TARIFF APPLICABILITY & TRANSPARENCY



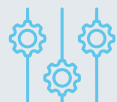
- + What specific HTS codes apply to this product or component?
- + What is the country of origin for each major input?
- + What tariff rate is currently applied (10%, 15%, 232, 301, etc.)?
- + What portion of the proposed increase is directly attributable to tariffs vs. other factors?

COST STRUCTURE VALIDATION



- + What percentage of the total cost is tied to the tariff-affected input?
- + Can you provide documentation showing the actual duty paid?
- + Is the increase based on current tariffs, or are you pricing future risk?

VARIABLE VS. PERMANENT PRICING



- + If tariffs decrease or expire, will pricing be reduced accordingly?
- + Can tariff-related costs be structured as a separate, variable line item instead of being embedded permanently?
- + Can we tie adjustments to an objective index or published tariff schedule?

ALTERNATIVE SOURCING & MITIGATION



- + Are there alternate manufacturing locations (USMCA, domestic, near-shore)?
- + What dual-sourcing options exist?
- + Would volume aggregation or forward buys reduce exposure?

Tariffs are often cited broadly, but the real impact varies significantly by product, component mix, and sourcing geography. By requiring transparency, structuring tariff-related costs as variable (not permanent), and applying competitive pressure, organizations can materially reduce unnecessary pass-through and protect margin in a volatile trade environment.

This disciplined questioning framework turns tariff disruption into a negotiation advantage rather than a cost inevitability.



CONCLUSION

The tariff landscape has shifted dramatically in just a matter of weeks. The Supreme Court ruling eliminated broad country-specific tariffs, but the administration's rapid move to implement a new 10%–15% temporary tariff structure reinforces a clear reality: tariffs remain a central policy tool and a continuing source of cost volatility. While some country-specific duties have eased, structural tariffs and ongoing geopolitical trade actions ensure that pricing pressure and uncertainty are far from over.

For businesses, the lesson is not to assume stability simply because one framework was struck down. Suppliers will continue to reference tariffs, alongside AI demand, energy costs, and supply constraints, as justification for price increases. The organizations that perform best in this environment will be those that stay proactive: aggregating demand where possible, validating tariff pass-through claims, competitively benchmarking incumbents, and building flexibility into contracts.

LogicSource will continue closely monitoring policy developments and market responses. As this new chapter in tariff policy unfolds, our focus remains the same, helping clients convert uncertainty into leverage, protect budgets, and build more resilient, cost-disciplined supply chains.



ABOUT LOGICSOURCE

The innovative leader in procurement services and technology, LogicSource is purpose-built to drive profit improvement, mitigate risk, and ensure supply chain continuity through better buying. LogicSource focuses exclusively on the sourcing and procurement of indirect goods and services, which typically represent 20% of an organization's revenue and the area of greatest spending inefficiency.

These include complex categories like marketing, packaging, corporate services, facilities, information technology, distribution and logistics, and more, for which organizations often lack the capacity, focus, and scale to achieve best-in-class buying. Unlike traditional advice-based consultants, LogicSource is a purpose-built buying utility with assets that are configurable to their clients' needs and ready to deploy.

By combining decades of sourcing and procurement expertise, superior market intelligence, cross-portfolio spending leverage, and their OneMarket® Source-to-Pay technology, LogicSource executes customized solutions that deliver immediate savings and sustainable value. For more information, visit logicsource.com.

ABOUT THE AUTHORS

This report was produced by the LogicSource Indirect Category Leaders and Center of Excellence, which leverages decades of expertise and data to help organizations navigate global trade challenges and optimize their procurement strategies. With a dedicated team of 200+ indirect category experts and access to \$200B+ in indirect pricing data, LogicSource equips our clients with the insights and tools needed to make informed decisions, mitigate risk, and drive sustainable value.

This update supplements the original [LogicSource 2025 Tariff Impact Analysis](#). For detailed category-specific impacts and baseline analysis, please refer to the original report or the [Tariff Report Library](#).

For more information or to discover how LogicSource can help your organization achieve best-in-class buying, visit logicsource.com.

