

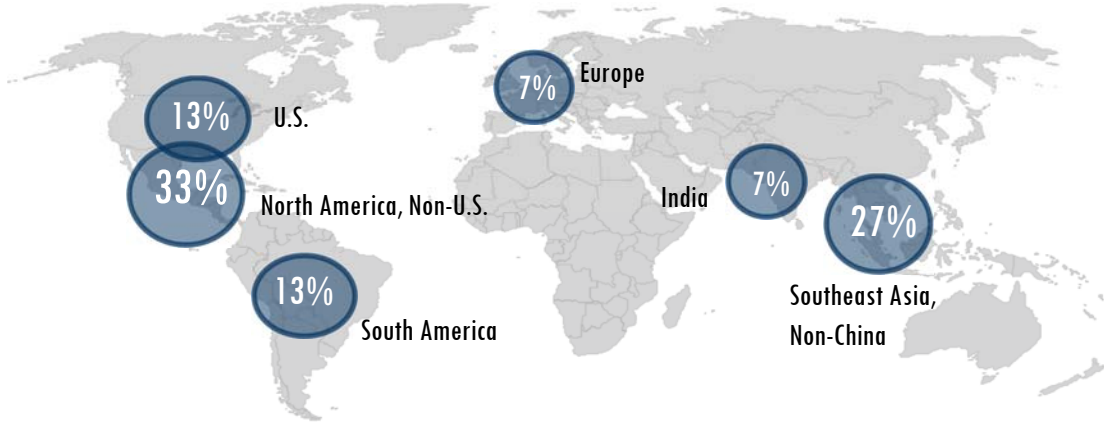
Tariff Impact on Middle Market



THE KEYSTONE GROUP

The Keystone Group created and distributed a survey to clients and industry contacts to better understand how recent tariffs are impacting middle market companies.

Where do you plan to move sourcing / production:



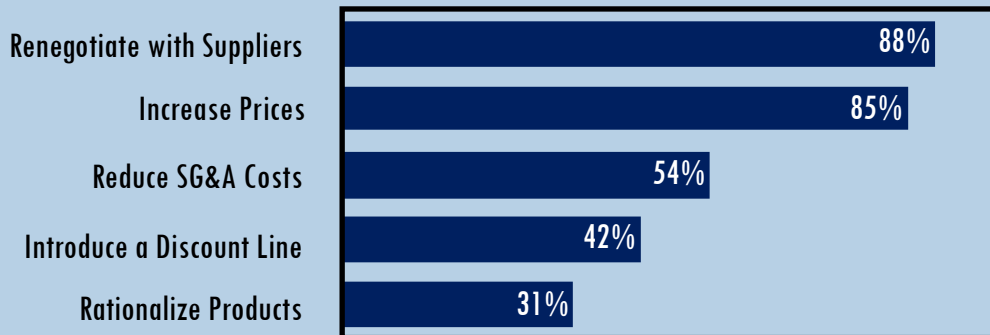
73%

of respondents have been affected by tariffs

Current Primary Sourcing Regions Include:

- U.S.**
- China**
- North America**
- Southeast Asia**

In the short term, companies are pursuing the following tactical actions to mitigate the impact of recent tariffs:

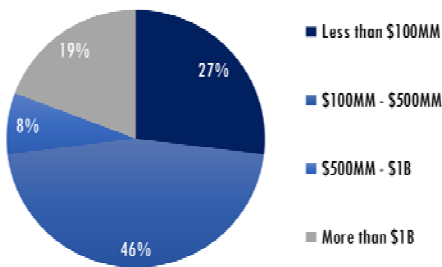


58%

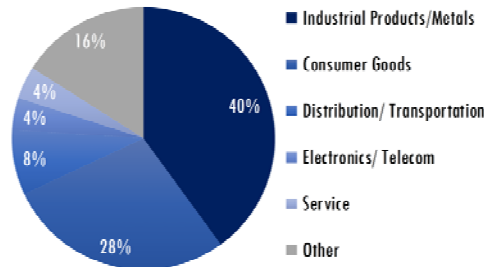
are considering relocating operations or sourcing

Respondent Demographics

By Revenue



By Industry



Keystone Engagements:

- Industrial Products**
- Consumer Goods**
- Home Goods**

Keystone Approach:



Analyze tariff impact



Assess inventory position



Develop pricing strategy



Renegotiate pricing with customers



Optimize long-term supply chain