

business impact of tariffs

2025 Survey Report

How U.S. Businesses Are Adapting Pricing
Strategies in a Volatile Trade Environment

introduction

The importance of pricing has never been greater. It touches every part of a business — every deal, department, channel, and system. In today's climate of economic volatility, pricing has become a vital lever for profitability and resilience. At the same time, shifting trade policy — marked by new and rising tariffs — is placing growing pressure on cost structures and margins. Many U.S. business leaders are still working to adapt their strategies to meet the complexity and challenges of these changes.

Zilliant has been a leader in pricing for more than 25 years, helping companies turn pricing into a powerful engine for growth. By aligning with customers' goals and challenges, we deliver intelligent solutions that protect margins and drive long-term profitability. Our mission is to create a world where pricing takes its rightful place at the helm of business strategy, unleashing its full power to conquer markets and lead industries.

To better understand how companies are responding to rising tariff pressure and shifting trade policy, we surveyed 400 senior executives — including CEOs, CFOs, and CROs — from organizations with over \$250 million in revenue. This report explores how these leaders are shifting business plans in response to tariffs, navigating competitive pressures, adopting AI-driven pricing tools, and elevating pricing decisions to the C-suite to better manage tariff-driven economic volatility.



macroeconomic volatility was already a factor

Even before the reality of new tariffs began to set in, businesses were not sailing on calm waters. Macroeconomic forces like inflation, rising interest rates, and supply chain disruptions were already in play—disrupting traditional price levels and update cadences across industries. According to our survey, 43% of respondents said these factors had significantly or severely impacted their pricing over the past 12 months, and 56% reported adjusting prices at least quarterly to stay aligned with market conditions.

These challenges—hallmarks of the COVID era—have become a persistent backdrop for many organizations. Today, the nature of volatility has shifted, but its impact continues.

43%

report that macroeconomic factors have affected their price levels significantly or severely in the past 12 months

56%

have adjusted prices at least quarterly in response to these factors

tariffs are shifting business plans

It should come as no surprise to business leaders, but tariffs are no longer a background concern. They are actively reshaping business strategy. According to our survey, 45% of respondents named tariff-related expenses, including direct tariffs and rising supplier costs, as their primary pricing challenge in 2025. Nearly half (44%) of businesses say they will pass increased costs to customers, while 42% have already shifted suppliers or sourcing regions to reduce tariff exposure.

These findings indicate that tariffs are not just adding costs but are driving broader changes in pricing models and supply chain structure. Companies that once absorbed such costs are now reassessing their entire go-to-market strategies to maintain profitability under new global trade realities.

44%

plan to pass increased
costs to customers

45%

cite tariff-related expenses
(including rising supplier costs) as
their primary pricing challenge

42%

have shifted suppliers or sourcing
regions in response to tariffs

competition also a top concern for the future

While tariffs weigh heavily on businesses, competitive pricing pressure is the most frequently cited challenge for 2025, with 33% of respondents naming it their top concern. Looking ahead, both “competitive price wars” and “tariff and trade uncertainty” are tied at 27% as the most significant concerns over the next 12–24 months. This underscores the twofold, interrelated pressures companies face: rising costs from government-imposed tariffs, and the need to remain competitive in a market where rivals are aggressively adjusting prices.

In response, businesses are recognizing the need for more nuanced pricing strategies. Rather than relying on broad price increases, leading companies are adopting targeted, value-based approaches that protect margins without sacrificing market position.

33%

of business leaders cite
competitive pricing as the
#1 challenge for 2025

54%

“Competitive price wars” (27%)
and “tariff/trade uncertainty”
(27%) tie as top concerns
over the next 12–24 months



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Businesses are avoiding across-the-board price increases in favor of **targeted, value-based strategies.**



ai is powering pricing agility

One of the most striking findings is the widespread adoption of AI in pricing strategy, with 83% of executives reporting they use AI-powered tools to adapt to economic volatility. These systems enable businesses to implement dynamic pricing based on real-time data, customer behavior, product value, and changing market signals.

This technology is not just enhancing accuracy; it's also accelerating speed. AI allows organizations to make faster, more informed pricing decisions that would be impossible through manual processes alone. In a volatile market, the ability to adjust pricing dynamically is a major competitive advantage, and likely a core reason why 87% of respondents remain optimistic about maintaining profitability.



AI adoption is likely a key driver of the 87% profitability optimism reported in the survey.

83%

of respondents are using AI-powered pricing solutions

16%

of respondents are exploring the use of AI-powered pricing solutions

pricing strategy has become a c-suite priority

Notably, pricing is now being driven from the top in most organizations. According to our survey, 98% of companies have a clear internal pricing decision-maker, and a significant share of that responsibility sits with executive leadership: 87% of CCOs and 68% of CEOs say they are the final decision-makers. Additionally, 56% believe pricing should ultimately be owned by the CEO.

This trend underscores a broader evolution: pricing is now viewed as a strategic lever, not an operational task. Businesses that elevate price strategy to the C-suite are better positioned to act with speed and precision when conditions shift, an increasingly critical capability in a turbulent environment.

98%

of companies have a designated pricing decision-maker

87%

of CCOs and 68% of CEOs say they currently lead pricing decisions

56%

believe the CEO should own pricing as a strategic lever

conclusion

As our survey shows, tariffs and competitive pressures are forcing businesses to rethink how they set prices, build resilience, and pursue long-term growth. Yet despite its importance, pricing often remains disjointed. Disconnected tools, unclear strategies, and slow responses create bottlenecks, confusion, and missed opportunities. Without a clear, unified approach, pricing becomes a source of confusion and conflict rather than a driver of growth and competitive advantage.

We call this condition **Pricing Anxiety**—and it's intensifying under the weight of rising tariffs, volatile markets, supply chain disruption, and increasingly price-sensitive customers.

To overcome Pricing Anxiety, companies need a clear, connected, and strategic approach to pricing. Companies that thrive in the new world will embrace AI-driven pricing, automate pricing operations, and use real-time intelligence to stay ahead. Treating pricing as a strategic function—and aligning it at the executive level—is essential to staying profitable, resilient, and competitive in today's economy.





about zilliant

Zilliant eliminates Pricing Anxiety and transforms pricing into business power. Zilliant's Precision Pricing Platform automates and optimizes pricing operations with real-time intelligence, rallying your entire organization around a single source of truth to protect margins and drive growth. Learn more about how Zilliant helps businesses transform pricing from a source of anxiety to a source of power at [zilliant.com](https://www.zilliant.com).