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Navigating Resilience

Key Insights for the Chemical C-suite

The current situation for chemical companies

Chemical investments are long-term commitments—shifting trade rules and rising uncertainty are unlocking both unprecedented risks and new opportunities

0.8%–3%	~30%	~42%	6-8 years
Potential increase in US inflation.	Of US chemical imports rely on foreign sources, notably from China and the Eurozone, which may be subject to tariff volatility.	Increase in foreign input costs for US chemical companies—the highest across sectors.	To build competitive chemical plants, requiring long-term planning. Tariffs could trigger lasting shifts in supply, demand and investments.

Sources: Accenture Chemical Industry Tariff Response and Resiliency Briefing Pack, April 2025
Accenture Consumer Goods & Services Tariff Response Executive Summary, May 2025

Top chemical CEO concerns

Demand Uncertainty – disrupted trade flows causing demand instability, delaying procurement cycles and investment decisions

Increased Costs – increased raw material, labor and logistics costs straining chemical company margins

Retaliatory Risk – retaliatory trade measures increasing regulatory scrutiny, disrupting market access and creating long-term uncertainty

End-use industry challenges – tariff costs and policy uncertainty causing concerns about affordability, supply security and value chain disruptions, especially in auto and consumer goods

What makes a resilient chemical enterprise?

Resiliency will be the key differentiator for chemical companies who can navigate this uncertain economic and policy environment—this covers commercial, operations, people and technology. Scenario planning is a critical to building enterprise and financial resilience.

Operational Resilience: Managing inventories; Maintaining margins amid inflation or disruption

Operational Resilience

Technology Resilience: Prioritizing digitalization & AI programs

Technology Resilience

Enterprise and Financial Resilience

Commercial Resilience

Commercial Resilience: Increasing contract flexibility; Adapting to trade flow shifts

Enterprise and Financial Resilience: Minimizing supply chain exposure risks; Aligning geopolitical capital expenditures; Improving operational response

People Resilience

People Resilience: Enhancing workforce flexibility; Upskilling talent

Resilience for competitive advantage today and tomorrow

Resilience across these dimensions is the key to responding to the uncertain economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

	What to do Now	What to do Next
Enterprise & Financial Resilience	Map global supply chain exposure using AI tools (e.g., Everstream, Super AI) to spot tariff-exposed suppliers and components	Launch tariff scenario planning with cross-functional teams (Legal, SCM, Finance, Commercial) to recommend real-time strategic actions
Operational Resilience	Build inventory of mission-critical inputs—catalysts, specialty chemicals, spare parts and equipment—from highly concentrated suppliers	Execute cost transformation programs with AI and analytics to identify procurement levers, alternate suppliers and margin preservation
Commercial Resilience	Capitalize on trade flow shifts by targeting new opportunities from disrupted competitors	Identify non-US customers supplied by US output. Win new business by supplying these customers with alternative sources
People Resilience	Launch targeted upskilling initiatives to build engineering and technical talent pools near critical operations	Promote internal mobility and cross-functional training to build an agile workforce that adapts to operational and localization shifts
Technology Resilience	Use digital twins and AI to simulate production flows and determine the most resilient site configurations	Develop capability for AI-enabled next-best-action

Learn how to turn resilience into a competitive edge:

Visit Navigating the new tariff landscape and its economic impact

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