

Navigating Resiliency

Key Insights for the Natural Resources C-suite

The current situation for Natural Resources companies

Risks for inflation, GDP decline, and recession are increasing, leading to higher household costs and consumer anxiety.

0.8–2.8%

Potential increase in US inflation

High

Risk of recession in the US

31%+

Natural Resources companies can face up to a 31%+ increase in the cost of their foreign inputs

\$4,900

Potential additional yearly costs for US households

Sources: Accenture Ready for resilience: how to navigate the new tariff landscape, April 2025

Top CEO concerns

Pressure on margins – Tariff uncertainty created risk of decline in profitability due to volatility across commodity prices and higher input cost

Weak consumer demand – Tariffs can raise input and export costs, intensifying inflationary pressures across downstream industries.

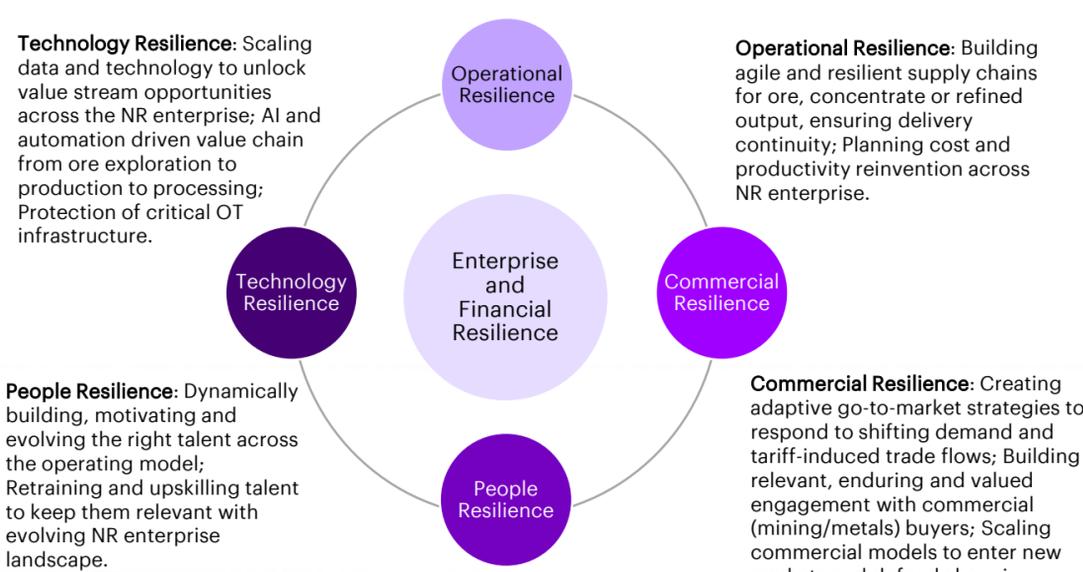
Supply chain disruption – Tariffs can disrupt supply chains optimized for different conditions, forcing companies to shift sourcing, flow of goods and (longer-term) networks.

Market access barriers – uncertainty can significantly disrupt trade dynamics, restricting the access to potential markets and increasing the risk of revenue loss

Investment uncertainty – price volatility is making it difficult for companies to predict future revenue, which is deferring investors

What makes a resilient enterprise?

Resiliency will be the key differentiator for companies who can navigate this uncertain economic and policy environment – this covers commercial, operations, people, and technology. Every Natural Resources company will need to excel in scenario planning, demand generation, building resilience in their supply chains, and driving productivity improvement efforts to offset potential margin impacts.



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	Start your journey towards enterprise business planning to enable holistic investment decisions	Reassess asset portfolios and operational footprint, based on shifting trade, tariffs and commodity demand
Operational Resilience	Establish supply chain visibility and modeling, supplier diversification and integrated business planning	Restructure asset base and investment plans and explore alternative execution models to reduce project risk
Commercial Resilience	Optimize pricing models and contract structures to maintain competitiveness in a volatile trade environment	Reassess commercial positioning amid geopolitical tensions and trade restrictions
People Resilience	Drive productivity with automation, augmentation and reskilling	Ongoing strategic workforce planning to optimize work/roles for an agentic organization
Technology Resilience	Use predictive analytics for operations reinvention	Enabled by AI: Leverage agents to reinvent productivity

To learn more about how to turn resilience into a competitive edge visit:

<https://www.accenture.com/us-en/insights/strategy/navigating-new-tariff-landscape-economic-impact>