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

decline in profitability due to volatility across commodity prices and higher input cost

Weak consumer demand – Tariffs can raise input and export

Pressure on margins - Tariff uncertainty created risk of

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

Resiliency will be the key differentiator for companies who can navigate this

What makes a resilient enterprise?

uncertain economic and policy environment – this covers commercials, 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.

value stream opportunities
across the NR enterprise; AI and
automation driven value chain
from ore exploration to
production to processing;
Protection of critical OT
infrastructure.

Technology
Resilience

People Resilience: Dynamically
building, motivating and

Technology Resilience: Scaling

data and technology to unlock

the operating model; Retraining and upskilling talent to keep them relevant with evolving NR enterprise landscape.

evolving the right talent across

Operational

Resilience

People

Resilience

Enterprise

and

Financial Resilience output, ensuring delivery continuity; Planning cost and productivity reinvention across NR enterprise.

Operational Resilience: Building

agile and resilient supply chains

for ore, concentrate or refined

tariff-induced trade flows; Building relevant, enduring and valued engagement with commercial (mining/metals) buyers; Scaling commercial models to enter new markets and defend share in volatile commodity environments.

Commercial Resilience: Creating

respond to shifting demand and

adaptive go-to-market strategies to

economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

Resilience across these dimensions is the key to responding to the uncertain

Resilience for competitive advantage today and tomorrow

What to do Now What to do Next

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

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

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