

# THE SHIFT TO SUPPLY CHAIN RELIABILITY

## NEW INDUSTRY DATA FROM U.S. IRON & STEEL PURCHASERS

Tariffs, trade policy, and ongoing supply chain volatility are reshaping industrial procurement. Manufacturers are shifting from lowest cost to long-term reliability, predictability, and Total Cost of Ownership.

SURVEY OF

# 335

U.S. decision-makers purchasing iron and steel castings, bar stock, and steel weldments.

# 70%

serve the construction equipment industry.



RELIABILITY  
OVER SPEED

# 82%

Prefer **Highest Quality** over  
**Fastest Design-to-Delivery**



# 66%

Prioritize **Delivery Reliability** over  
**Fastest Delivery Possible**



# 74%

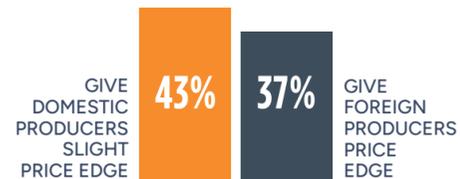
Rank **"Made in the USA"** as  
Most Appealing Characteristic

### PERFORMANCE PERCEPTION COMPARISON

DOMESTIC MANUFACTURING RATED HIGHER FOR:



PRICE PERCEPTION



# 54%

Always Calculate **Total Cost of Ownership (TCO)**



# 40%

Calculate TCO at Least **Occasionally**

# 67%

Say Supplier Support on TCO Analysis  
Would Be **"Very Helpful"**



# 65%

Open to **Adding or Changing Suppliers** in the Next Year



# 47%

Currently **Evaluating** Iron Casting  
Suppliers

# 52%

**Already Work** with an Iron Foundry



**"Manufacturers are prioritizing supply chain security and operational consistency as a business imperative."**

— SHANE BONNER,  
PRESIDENT, CHARTER CASTING

