Altana × AAEI | TRADE SURVEY

The State of Enterprise Trade & Customs Organizations

As trade regulations and tariffs have increased, so has the importance of trade and customs functions at major businesses. But according to a joint Altana and American Association of Exporters and Importers (AAEI) survey of 230 enterprise trade leaders, resources haven't grown at the same pace as rising work volume and more complexity. More than half of trade operations at enterprise businesses are not ready for the demands of modern trade.

Contents

CHALLENGES

01	Only about 1 in 10 trade teams are considered equals to supply chain, operations, finance, legal, and other departments	04
02	The job is getting harder, but for three-quarters (74%) of trade teams, resources aren't growing fast enough	06
03	Maintaining centralized product records is the most important accountability in trade compliance, but 76% of trade teams couldn't produce full information about a product within a day	09
04	At enterprise businesses, there is no industry-standard tool for performing trade and customs work, with a web of systems adding stress and manual work	13
05	GTM systems are common at Fortune 100 enterprises, but only about half of trade leaders (49%) think they've "kept pace well" in recent years	15
06	The challenges plaguing trade teams span the full gamut of software and processes	18
07	Almost all trade teams are under pressure to do more with AI, but AI use is being held back by concerns about security and confidence about holding up to a customs audit	22

POSSIBILITIES & PROMISE

08	Trade teams that have their own, empowered organization — or report directly to finance — are more trade-ready and less likely to say their job has gotten much more difficult since the start of 2025	26
09	If AI systems were made for trade — built on real facts, authority, and evidence — most trade teams would be willing to adopt the technology	30
10	Amid the demands of a challenging global trade environment, and even without a shared source of product truth, enterprise trade teams are largely confident their broker filings are accurate	33
	Defining trade readiness	35
	About the survey & respondents	36
	Methodology	39

230
Trade leaders surveyed

51%
Not fully 'trade-ready'

91%
Under pressure to do more with AI

Rising tariff rates and more complex, demanding regulations have fractured the global trade environment. The importance and workload of the trade professional has never been higher.

But at major companies, this explosion in work and commercial value has not been accompanied with sufficient investment into new, better trade software or processes.

Altana and the American Association of Exporters and Importers (AAEI) sponsored a joint market research survey of trade and customs teams at enterprise businesses. Of 230 surveyed trade and customs leaders, 61% say their job has become significantly harder since the start of 2025. Only 26% feel their resources have grown enough to keep pace. 91% are under pressure to do more with AI.

A composite scoring of respondents' ability to perform eight vital, modern trade capabilities without crippling cost or time loss indicates that 51% of trade and customs departments at enterprises don't meet the threshold of "trade readiness." Trade-readiness is the ability to prep products to cross borders, and keep them ready even as rules change, without extraordinary cost or overwhelming loads of manual work. Businesses that are trade-ready have defensible evidence behind every product's trade decision before it crosses the border. Businesses that aren't trade-ready struggle to get complex, multi-tier products to cross borders without triggering denied party screening violations, overpaying or underpaying duties, or missing out on free trade agreement (FTA) qualification.

Along with these challenges are sources of optimism. Trade teams that are structured as independent business drivers — sitting alongside supply chain and operations departments, not below them — are less overwhelmed and are twice as likely to meet the scoring threshold for modern trade readiness. Optimism and willingness to use AI abounds, so long as the technology is secure, verified, and built for their trade operations and product catalogs. And even as a surge in regulations and complexity has swamped brokerages, enterprise trade teams remain confident in their broker filings, though both parties want smoother communication and more shared visibility into product information.

Explore the full report for the obstacles and opportunities facing modern trade compliance leaders, their departments, and the businesses they serve.

01

CHALLENGES

Only about 1 in 10 trade teams are considered equals to supply chain, operations, finance, legal, and other departments

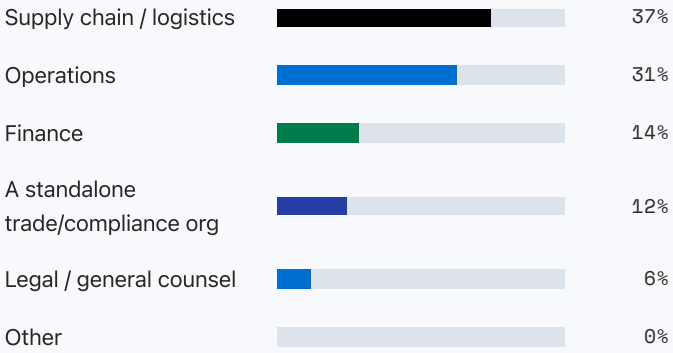
Despite constant headlines about trade wars and increasing commercial importance, the survey found that only 12% of trade functions at enterprises sit as a standalone trade or compliance organization. The rest are subordinate to supply chain logistics (37%), operations (31%), finance (14%), or legal (6%).

37%

Of trade teams report to supply chain/logistics, the most common reporting line

Trade professionals report that even without their own department, they are more and more frequently collaborating across their business. They say that stricter regulations, changes in sourcing, and the greater potential for mistakes to compound into significant penalties, delays, tariff overpayment, underpayment, or missed FTA qualification has them stretched by asks from and collaboration with manufacturing, procurement, finance, sales, legal, and other functions.

Where the trade/customs function reports



Base 230 respondents. All respondents.

"The biggest change since 2025 is my team has been in very high demand across our organization."

Director, Trade Compliance, Automotive, reports to Operations

"My work used to feel more predictable and routine. My time was focused on delivering what our financial reporting team needed. Now I am working more with procurement, legal, and other functions."

Sr. Manager, Trade Compliance, Automotive, reports to Finance

"Rules grow more complex daily; work feels high-stakes instead of routine administrative tasks"

VP, Trade Compliance, Industrials, reports to Standalone trade/compliance org

"So much of the job now is sitting in meeting after meeting in order for us and our supply chain and legal teams to be apprised of how changes with regulations could affect our sourcing, compliance, and overall business."

VP, Logistics, Pharmaceuticals, reports to Finance

"Before 2025, it felt like we were focused mostly on execution and compliance, but now the job feels faster, more data-driven, and more mission-critical. Our team balances innovation, regulatory pressure, and direct customer impact with every decision."

VP, Trade Compliance, Pharmaceuticals, reports to Operations

02

CHALLENGES

The job is getting harder, but for three-quarters (74%) of trade teams, resources aren’t growing fast enough

61% of respondents say their job has been “somewhat” or “much” harder since the start of 2025. 27% say it’s been “about the same” level of difficulty.

How the difficulty of the job has changed since the start of 2025



Much harder	16%
Somewhat harder	45%
About the same	27%
Somewhat easier	12%

Base 230 respondents. All respondents.

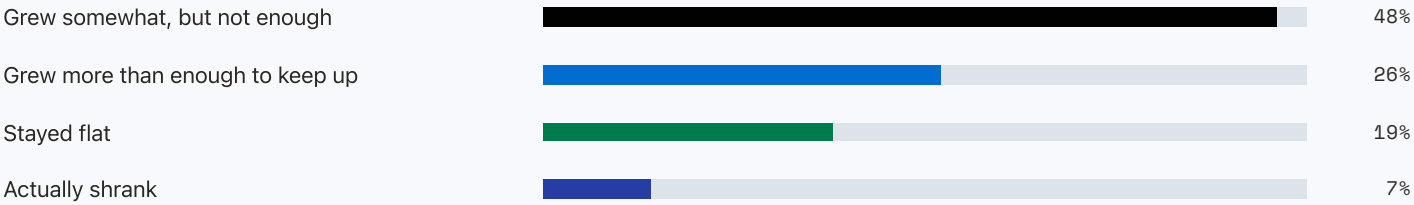
61%

Of respondents say their job has been 'somewhat' or 'much' harder since the start of 2025

Only about 1 in 10 (12%) think it's become somewhat easier during that same time period.

Meanwhile, about three-quarters (74%) of trade teams say their resources haven't kept pace enough to keep up with these new demands.

Change in resources over the same period



Base 230 respondents. All respondents.

48% say their resources grew somewhat but not enough, 19% say their resources have remained flat, and 7% said their resources actually shrank.

The result is an overwhelmed, exhausted workforce that doesn't foresee a respite in the intensity or challenges of their role.

> "The job used to be something that I loved doing, and honestly in the past year and a half has become something that has created an insane amount of stress and anxiety. For the first time, I sometimes dread going to work."

Director of Import/Export Operations, Apparel & Textiles, reports to Supply Chain

> "We need approximately four more people but salary and budget constraints mean I'll be lucky to hire one."

Director, Import/Export Operations, Apparel, reports to Supply Chain

"Leadership hasn't sat through some of our frenzied Friday afternoon filing periods and experienced that pressure. So we continue to put patches on what we do rather than transform it."

Senior Manager, Trade Compliance, Automotive, reports to Finance

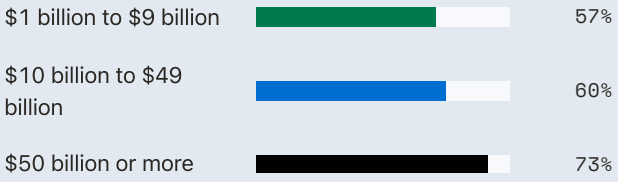
"It feels like it would take an act of God to make this job easier."

Director, Import/Export Operations, Automotive, reports to Operations

SURVEY INSIGHT

Working at a big business isn't sparing trade teams

Percentage of respondents who say that their job has gotten 'somewhat' or 'much' harder since the start of 2025, by annual revenue



Base 230 respondents.

73%

Of trade teams at $50B+ companies say their job has gotten somewhat or much harder

Trade teams at Fortune 100-level companies are the most likely to say their job has gotten somewhat or much harder since the start of 2025.

03

CHALLENGES

Maintaining centralized product records is the most important accountability in trade compliance, but 76% of trade teams couldn’t produce full information about a product within a day

A paradox shadows modern trade work: Maintaining a centralized, multi-tier product record is the single most common and important accountability for trade compliance and customs teams at enterprises. But more than three-quarters of those teams (76%) say they can’t produce full information about a product within 24 hours if they receive a CF-28 from CBP, get questions from a broker, or need to work with a different department at their own company.

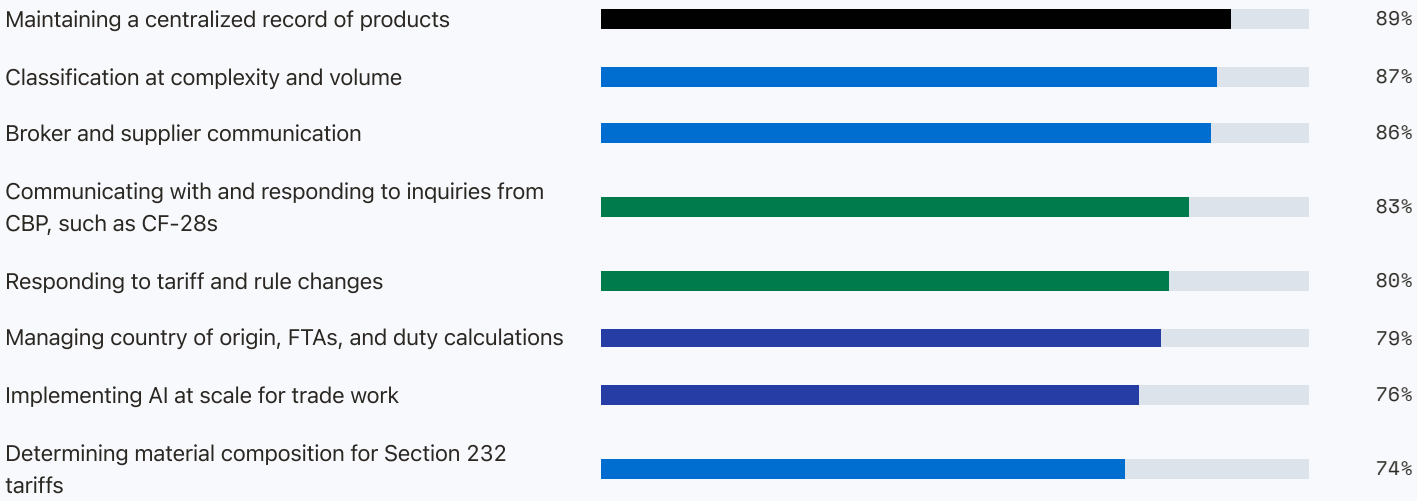
76% of trade teams at enterprises can’t produce full information about a product within 24 hours

89%

Of trade teams are responsible for maintaining a centralized record of products

A full 89% of trade teams are responsible for maintaining a centralized record of products. Other common accountabilities include high-complexity or high-volume product classification (87%); managing Country of Origin (COO), FTA qualification, and duty calculations (79%); and determining material composition for Section 232 and other component-based tariffs (74%).

Most common accountabilities



Share of respondents accountable for each area. Multi-select; base 230 respondents.

Maintaining a centralized record of products means having a record of each product’s value chain — the components and materials in a good and the facilities and suppliers that went into its manufacturing. This record has become more critical, as complex tariffs on material composition have risen and denied party screening regulations, documentation needed to qualify for FTAs, and other trade regulations have moved upstream in supply chains, all the way to raw materials.

"When sourcing patterns change, it affects all the trade information about a product that we need to ensure our filings and attestations to CBP stay accurate and compliant — country of origin, HS codes, supplier compliance details."

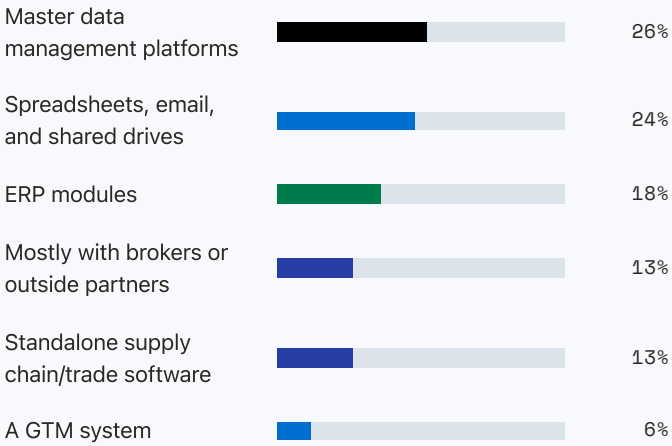
Sr. Manager, Trade Compliance, Pharmaceuticals, reports to Finance

26%

Of respondents say their trade product data primarily lives in master data management platforms

Despite maintaining a central record of product data being the most important accountability for trade teams, there is no industry-standard for where it is stored. And since trade product data typically lives outside of the tools in which trade work gets done, respondents say that answering a request for more information about product data means leaving the trade tool and sifting through multiple systems and records.

Where trade product data primarily lives



About one-quarter of respondents say their trade product data primarily lives in master data management platforms used by the whole organization (26%), or across spreadsheets, emails, and shared drives (24%). Others primarily keep product data in custom ERP modules (18%), supply chain/trade management software built primarily for the buying, selling, inventory tracking, and moving of goods (13%), or have brokers or outside partners own storage and maintenance (13%).

Only 6% of respondents keep product data primarily in a global trade management (GTM) software system that specializes in cross-border regulatory compliance, complex duty calculation, classification, and FTA qualification, and denied-party screening.

WHAT THIS MEANS

Trade data rarely lives within the systems in which trade work actually happens. Getting trade work done means feeding data to GTMs, ERPs, or brokers. And holding product records in ERPs, general business management, or supply chain-focused platforms often requires painful extensions and forfeiting the ability to capture granular, trade-specific details. When trade rules or sourcing changes, an internal scramble occurs to manually review and update data across multiple systems.

"All the recent trade rules and sourcing pattern changes have us scrambling across our internal teams and systems to get the right product information and documentation."

Director, Trade Compliance, Automotive, reports to Operations

"We manually review and update product data across multiple systems and spreadsheets which takes time and can create delays."

Sr. Manager, Trade Compliance, Electronics & Semiconductors, reports to Supply Chain

04

CHALLENGES

At enterprise businesses, there is no industry-standard tool for performing trade and customs work, with a web of systems adding stress and manual work

Just as there is no industry-standard for where enterprise trade teams store product data, there is also a range of approaches for which tools are used to actually perform trade and customs work.

The most common primary tool for trade work is a dedicated global trade management (GTM) system, used by more than one-third (37%) of respondents.

Other trade teams mostly use customized ERP modules or other homegrown technology (19%). 14% have no primary tool, using a mix of available options.

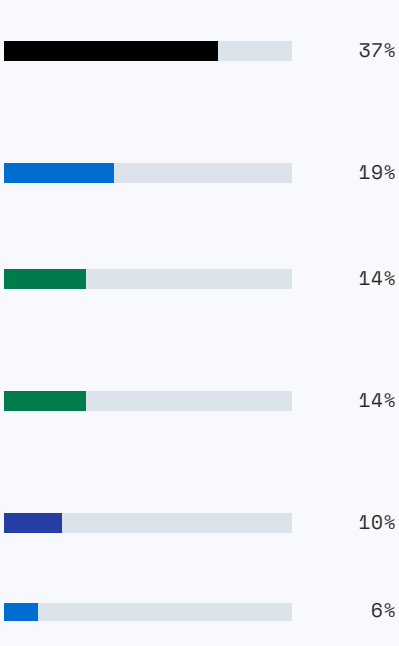
37%

Of respondents use a dedicated global trade management (GTM) system as their primary tool

About one-third (30%) of respondents don't generally rely on any form of software for trade work. These teams mostly absorb work through sheer team hours, with little spend on tools or outsourcing (14%), use spreadsheets (10%), or outsource to brokers or consultants (6%).

Respondents say that tool fragmentation often has them get stuck in a challenging pattern of chasing data, cobbling together information, and then doing trade work manually.

How trade/customs work gets done



Base 230 respondents. All respondents.

"Working across multiple systems makes it hard to get faster, more accurate filings and reduce compliance risks. I wish we could reduce our manual work and stress, and instead focus on proactive problem solving instead of chasing data."

Sr. Trade Compliance Manager, Pharmaceuticals, reports to Finance

"Without a single system of record, we rely on a chaotic mix of shared spreadsheets, constant email threads, and manual double-checks to keep everything from falling through the cracks."

Director, Trade compliance, Automotive, reports to Operations

"Our system surfaces alerts for possible changes in sourcing. It cannot make trade rulings, so our analysts validate facts and finalize origin determinations manually."

VP, Logistics, Industrials, reports to a Standalone Trade Compliance organization

"We maintain accuracy through conducting a continuous cycle of cross checks where I compare our spreadsheets against emails from vendors, entries summary, and previous decisions."

Sr. Manager, Trade Compliance, Automotive, reports to Finance

05

CHALLENGES

GTM systems are common at Fortune 100 enterprises, but only about half of trade leaders (49%) think they've "kept pace well" in recent years

The trade tool of choice at the largest enterprise companies is usually GTM software. Whether that GTM system has kept pace with current demands is a toss-up.

The likelihood of using a dedicated GTM system as the primary tool for trade and customs work surges as company revenue gets higher.

One-third (33%) of enterprises that do $1 billion to $9 billion or $10 billion to $49 billion in yearly revenue mostly get trade work done in a dedicated GTM. At $50 billion or more in yearly revenue — roughly corresponding to Fortune 100 status — more than half (53%) of trade teams mostly use a dedicated GTM.

53%

Of trade teams at $50B+ companies mostly use a dedicated GTM

Smaller enterprises, meanwhile, are more likely to lean more heavily on ERPs, broker outsourcing, spreadsheets, or simply upping team hours, without significant spend on tools or outsourcing.

Despite being popular with major multinationals, only about half of trade leaders (49%) think that GTMs have kept pace with a more difficult global trade environment.

Primary tool in which trade/customs work gets done, by company revenue

	$1–9B	$10–49B	$50B+
Dedicated GTM	33%	33%	53%
ERP modules / homegrown internal tools	22%	17%	14%
Absorbed through team hours; little tool/outsourcing spend	10%	23%	12%
Spreadsheets, manual processes, or outsourcing to brokers	16%	18%	12%

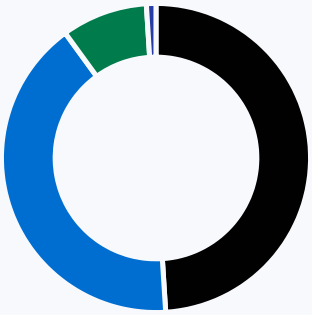
49%

Of respondents say their GTM software has kept pace well

The other half of respondents say their GTM software has kept pace “somewhat” (41%) or actively fallen behind (10%).

Respondents’ testimonials indicate that when GTMs do somewhat keep pace, it’s because trade and IT teams are working around their shortcomings, and spending significant time and money on data integration, consultants, and manual work.

How well has GTM software kept pace?



Base 230 respondents. All respondents.

Data Integration and Schema Drift

ERP and GTM architectures speak fundamentally different languages. Minor modifications or field adjustments within a customized enterprise ERP frequently break fragile automated API pipelines, causing silent sync failures and corrupted data payloads.

Upstream Data Corruption ("Garbage In, Garbage Out")

GTM engines rely entirely on clean transactional inputs from procurement and logistics teams. When a purchasing agent enters a typo, an unverified address, or an improper entity name into the ERP, it triggers false positives in Denied Party Screening, locking down legitimate supply chains.

Lack of Context-Aware Reasoning

While modern GTM platforms automate raw global tariff table updates, they cannot autonomously execute the logic behind those updates. When trade regulations shift, the software cannot reclassify an extensive parts catalog or interpret ambiguous country-of-origin gray areas without human compliance experts manually rewriting the system rules.

Static Architecture vs. Dynamic Sourcing

GTM systems function as passive, rigid repositories rather than adaptable assistants. When geopolitical tensions force an overnight manufacturing or sourcing pivot, the GTM remains blind to the change, requiring extensive manual intervention to adjust the underlying Bills of Materials (BOM) and regulatory flags.

High Cost of Implementation and Customization Maintenance

Deploying an enterprise GTM requires massive upfront capital and continuous IT spend. Because out-of-the-box software rarely aligns with a multinational's unique supply chain footprints, companies face steep, recurring integration debt to build and maintain the heavy customizations needed just to keep the platform functional.

> "The ERP's strength for trade is that upstream actions flow automatically into the trade module to invoke timely declarations, but many of these systems were never built with trade in mind. So cleaning up the data, customizing the platform to get trade right, and ongoing maintenance carry a high cost."

Director, Trade Compliance, Industrial Manufacturing

06

CHALLENGES

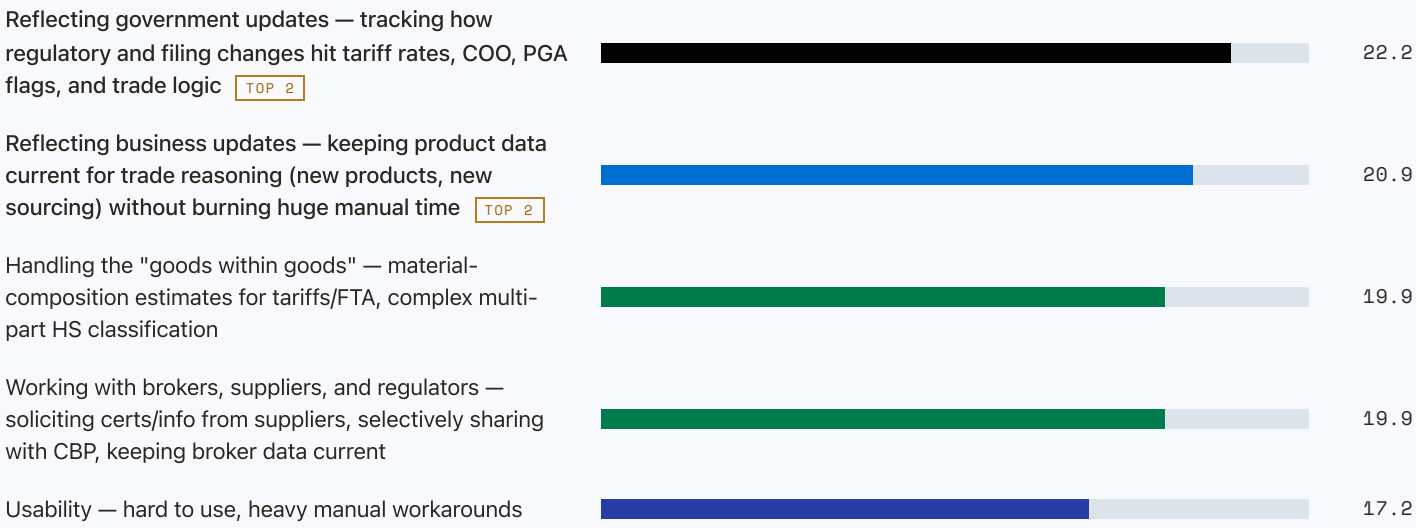
The challenges plaguing trade teams span the full gamut of software and processes

The challenges of a more complex, demanding global trade environment are not just hitting one portion of enterprise trade and customs teams' workflows. The full gamut of trade data management, software capabilities, and operational processes are being stressed.

Survey respondents were given 100 points with which to weigh places where trade software and processes are falling short. Overall, the mean weighted scores ranged from a low of 17.2 to a high of 22.2, indicating a fairly evenly distributed set of trade pain, ranging from managing a product catalog to working with brokers, suppliers, and regulators to dealing with heavy, manual workarounds for software systems.

Where trade software and processes fall short

Both of the highest-scored challenges concern keeping product and trade data current, which informs all other trade work:



Base 230 respondents · Mean points of 100. All respondents.

Reflecting government updates — the regulatory and filing changes that affect tariff rules and rates, COO, PGA flags, denied party screening lists, and trade logic — is the most common place where current trade software and processes are falling short.

Reflecting business updates — namely changes in direct and upstream sourcing, which affect product composition and therefore trade reasoning — is the second-most common place where current trade software and processes are falling short.

"When trade rules or sourcing changes, our team has to review product data, update classifications and origin information, and synchronize those changes across our ERP and trade systems. The process is still fairly manual, so keeping filings and CBP documentation current takes significant coordination and time."

Director of Global Logistics, Industrials, reports to Supply Chain

"When trade rules or sourcing patterns change, the product information we rely on for CBP filings and attestations does not update itself. It goes stale and the risk sits with us until we deliberately refresh it."

Director, Logistics, Pharmaceuticals, reports to Supply Chain

"Regulatory or sourcing changes have become a huge challenge. We have to update our ERP records, manually review each change and validate, and then share across multiple compliance teams."

Director, Automotive, reports to Finance

"Everything gets completely scrambled when rules or sourcing changes. We're forced into endless manual updates to fix outdated HTS codes and missing supplier information."

VP, Trade Compliance, Industrials, reports to Supply Chain

The next two high-scoring instances where trade software and processes fall short are directly tied to the challenges of keeping product and trade data current when rules or sourcing patterns change.

Reasoning over the "goods within the goods" — components and materials that determine material composition-estimates for tariffs, FTA qualification, complex classification for multi-part products, and more — is third-highest scored trade pain, and threatens some enterprises' entire entry process.

"Changes happen and I need to pursue all new information on every products' component make-up in a moment's notice. This creates a situation where my team and I must verify every single piece of upstream product data according to the latest rulings, since an inaccurate tariff number or an improper use of a preference can slow down or delay the whole entry process — or even penalize us."

Sr. Manager, Trade Compliance, Automotive, reports to Finance

Similarly, respondents say that the fourth highest-scored trade pain — soliciting certification and information from suppliers, keeping broker data current, and working with regulators to clear entries — is hard and getting harder.

"There's so much back-and-forth with our suppliers and brokers. Brokers repeatedly ask us for missing product details, classifications, origin information, or documentation, and then we have to go ask the suppliers."

Sr. Manager, Trade Compliance Electronics & Semiconductors, reports to Supply Chain

General usability of trade software and tools also registered as a commonly-scored pain point. Respondents mentioned frequent heavy, manual workarounds and the tools' limited capacity to handle nuanced, high-value trade work, especially if sourcing or reasoning doesn't fit preexisting patterns.

"Our system and tools are useful only up to the point where data is clean, the rules are stable, and the transaction fits a known pattern."

Director, Logistics, Pharmaceuticals, reports to Supply Chain

"The tools handle data entry and basic tracking. But when it comes to problem solving, reviewing exceptions, and making sure everything is compliant, our team has to step in and do the manual work."

Director, Trade Compliance, Automotive, reports to Operations

WHAT THIS MEANS

The biggest, most impactful day-to-day operations challenges for enterprise trade teams link back to a lack of clean, continuously-updating product data. Trade rules or sourcing changes and a manual data scramble begins. If found, inadequate data drips into mediocre tooling that requires manual workarounds and only recognizes existing trade patterns. Trade teams and leaders end up swamped in low-value work — chasing data and tech troubleshooting — just at the time when overall trade complexity has soared and their strategic judgment is needed at the highest levels of their business.

07

CHALLENGES

Almost all trade teams are under pressure to do more with AI, but AI use is being held back by concerns about security and confidence about holding up to a customs audit

Nearly every trade team and leader is under pressure to do more with AI, but ongoing concerns about data security and skepticism about withstanding CBP scrutiny is dampening adoption.

Roughly 9 in 10 trade teams (91%) are either under pressure to do more with AI from leadership or are driving AI adoption themselves.

91%

Of trade teams are under pressure to do more with AI

The plurality of teams (36%) are getting strong but not formal encouragement from their leadership to do more with AI. 31% have a formal mandate from leadership. Roughly one-quarter (24%) of trade teams are driving AI adoption themselves.

Only 9% of trade teams are under little or no pressure to do more with AI.

Pressure to do more with AI



Strong encouragement, not formal	36%
A formal mandate from leadership	31%
We're driving it ourselves	24%
Little or none	9%

Base 230 respondents. All respondents.

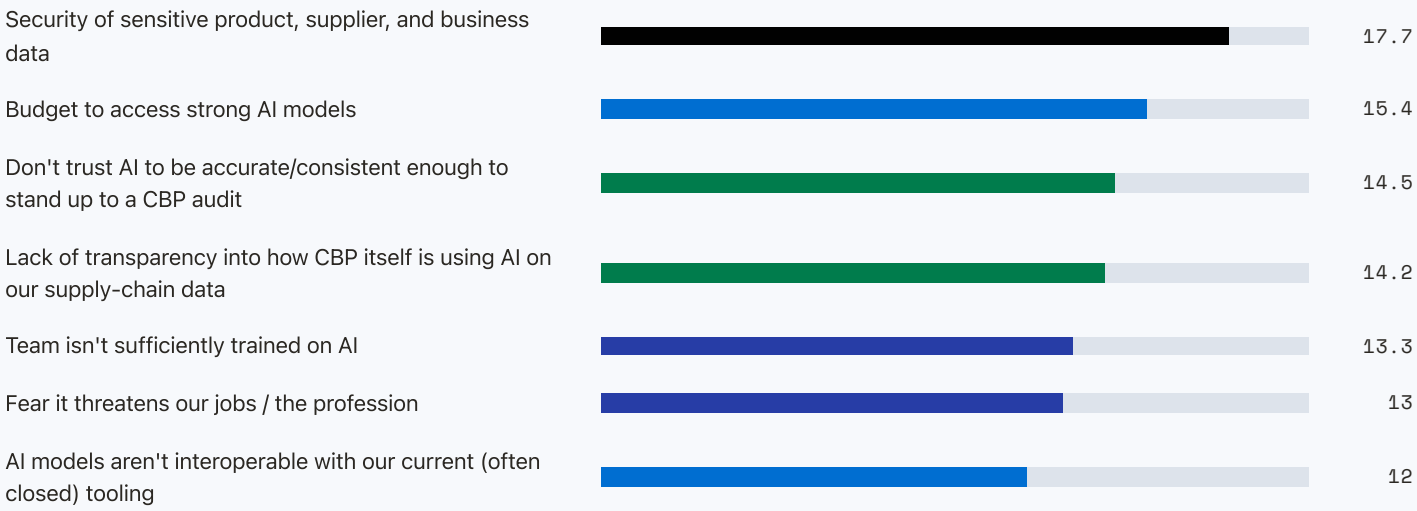
> "My honest gut reaction is cautious optimism — AI could speed up classification, document review, and exception flagging, but for trade work we're accountable for, it has to be highly accurate, auditable, and backed by human oversight before we'd ever trust it with compliance decisions."

VP, Trade Compliance, Pharmaceuticals, reports to Operations

Despite the pressure to do more with AI, trade teams have concerns that are holding them back from more robust adoption. When survey respondents were given 100 points with which to weigh what is holding them back from using AI, a spate of concerns emerged.

What holds teams back from using AI

The highest-scoring reason trade teams aren't using AI is concerns about the security of sensitive product, supplier, and business data.



Base 230 respondents · Mean points of 100. All respondents.

> "AI seems great and like it could save a lot of time and effort. The only big issue is concerns about data security."
>
> Director, Trade Compliance, Apparel & Textiles, reports to Finance

The second-highest scoring hold-up to AI use is having the budget to access strong, trade-worthy AI models. Other high scores include not trusting AI to stand up to a CBP audit, feeling a lack of transparency about how CBP as a regulator is using AI, and feeling that the trade team lacks the sufficient training to make the most of AI.

Lower-scoring AI concerns from respondents include a fear that AI threatens jobs or the trade profession, and concerns about AI models not being interoperable with current tooling.

Threaded throughout the survey responses are feelings that trade work is nuanced and that legal accountability requires humans to maintain oversight and access AI built for trade. And in addition to concerns about the security of sensitive data, some trade teams wonder whether applying AI workflows to messy pools of data will increase rather than eliminate complexity and confusion.

"We hesitate to let AI own outcomes since our team bears full compliance liability for filings."

Director, Industrials, reports to a standalone trade/compliance org

"I know how AI would help us avoid being drowned in spreadsheet analysis and repetition, but I am concerned that we may lose something that only the human eye would be able to detect regarding an intricate origin declaration. I still need to review every borderline classification. It's my name on the filing."

Sr. Manager, Automotive, reports to Finance

"AI could help us keep up with changes, but we need human review. I also worry about accountability because if AI's decision leads to penalties, our team may ask who owns the mistake."

Sr. Manager, Trade Compliance, Electronics & Semiconductors, reports to Supply Chain

"I want us to get our data ducks in a row so that we can effectively utilize artificial intelligence. My fear is that we just throw AI tools into the messy mix we have now, and that messy mix gets even messier."

Director, Trade Compliance, Apparel, reports to Legal

08

POSSIBILITIES & PROMISE

Trade teams that have their own, empowered organization — or report directly to finance — are more trade-ready and less likely to say their job has gotten much more difficult since the start of 2025

Empower trade teams — or at least give them meaningful access to the power of the purse — and they are more likely to be ready for the demands of modern trade.

When scored across eight vital trade capabilities, including classifying complex, multi-tier products, calculating material composition tariffs, and determining FTA qualification, trade teams that report to finance or sit in a standalone trade organization are far more likely to qualify as trade-ready than counterparts who are subordinate to operations or supply chain leaders.

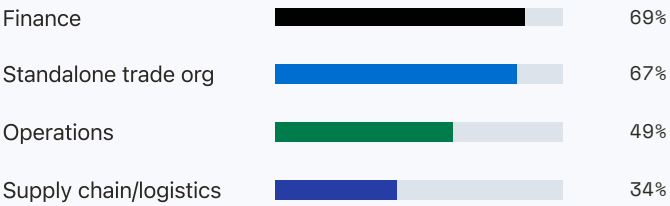
About 7 in 10 (69%) of trade teams reporting to finance reach the top scoring bands of trade readiness, the survey found. 67% trade teams in a standalone trade/compliance organization — equal in organizational status to finance, legal, operations, and supply chain — also reached the top readiness band.

67%

Of trade teams in a standalone trade/compliance organization reach the top readiness band

In contrast, about half of trade teams reporting to operations departments (49%) reached the top readiness band. And 34% of trade teams reporting to supply chain or logistics organizations qualify as trade-ready.

Readiness by where the trade function reports



Share reaching the top readiness band. Base 230 respondents.

Confidence in determining material composition for Section 232 tariffs, by reporting line



Share saying they can do this "without blowing a huge amount of time and money." Base 230 respondents.

91%

Of trade teams reporting to finance can determine material composition for Section 232 tariffs without blowing a huge amount of time and money

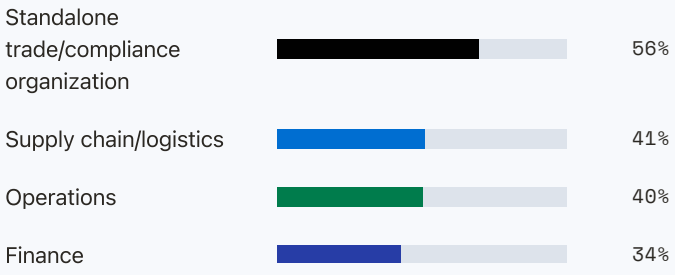
Zoom into the specific capabilities that determine trade readiness, and the gaps between empowered teams with access to budget and those subordinate to other functions become clear.

For example, 91% of trade teams reporting to finance feel they can determine material composition for Section 232 and other component-based tariffs "without blowing a huge amount of time and money." Only 66% of teams reporting to operations — and 59% of teams reporting into supply chain — feel the same way.

These reporting-line gulfs in capability also apply to high-complexity or high-volume product classification; origin, FTA, and duty determinations; maintaining a centralized product record; responding to tariff and regulation changes; and deploying AI at scale.

Where reporting structure has less of an effect is whether trade teams feel confident in their capability to respond to and communicate with CBP, brokers, and suppliers without wasting time and money.

Percentage of respondents saying that the difficulty of their role has been 'about the same' or 'somewhat easier,' by reporting line



Base 230 respondents.

56%

Of trade teams in a standalone trade organization say their job has been about the same or somewhat easier since the start of 2025

Beyond the significant differences in confidence in carrying out concrete trade capabilities, more than half of respondents (56%) say that the difficulty of their role has been "about the same" or "somewhat easier" if they are in an empowered, standalone trade organization.

In contrast, fewer trade teams reporting to supply chain (41%), operations (40%), or even finance (34%) say their job has been the same or somewhat easier since the start of 2025. And many of the respondents who are buried in the org chart, layers away from executive leaders or direct budget access, say that it's hard to get leadership proactively supporting improvements to trade software and operations until delays, detentions, duty overpayment, or other issues occur.

"For us to fully transform trade it would take unified data, a single system of record, and investment in automation with regulatory-grade controls. While our team feels the urgency daily, leadership sees the need but is still weighing risk, cost, and compliance impact before committing."

VP, Trade Compliance, Pharmaceuticals, reports to Operations

"We need a major budget increase and better software, but leadership doesn't really see the urgency. They only care when something goes wrong."

VP, Trade Compliance, Industrials, reports to Supply Chain

"It's a chicken-or-the-egg problem. If I was able to show them proven results, leadership would invest more."

VP, Trade Compliance, Apparel, reports to Supply chain

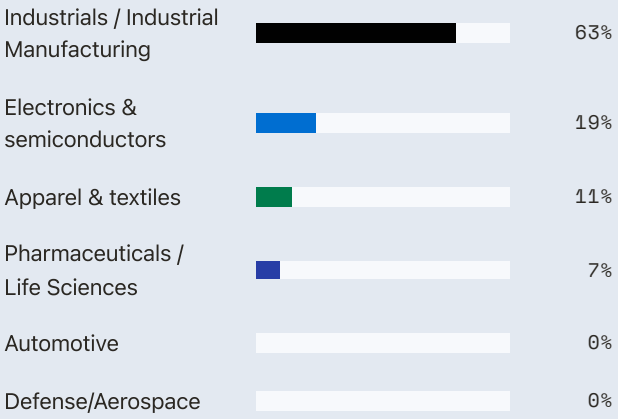
"To transform our trade function, leadership would need to treat it as a strategic capability. We would need better systems and cleaner data ownership. Right now, our team sees the need because we deal with the daily friction, but leadership may not feel the urgency until after there's a significant business disruption."

Sr. Manager, Trade Compliance, Electronics & Semiconductors, reports to Supply Chain

SURVEY INSIGHT

Standalone trade/compliance organizations are concentrated in industrial manufacturing

Of respondents saying they work in a 'standalone trade/compliance organization,' share drawn from each industry



63%

Of respondents in standalone trade/compliance organizations work in industrials / industrial manufacturing

09

POSSIBILITIES & PROMISE

If AI systems were made for trade — built on real facts, authority, and evidence — most trade teams would be willing to adopt the technology

Despite lingering concerns about data and accuracy, most trade leaders would be willing to use AI that is secure, verified, and built for their trade operations and product catalogs.

More than three-quarters (78%) of trade teams would trust this strong, secure AI. 46% would trust it for “most things;” 32% would “fully trust and adopt it.”

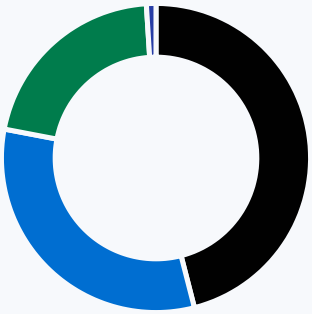
46%

Of trade teams would trust secure, verified, trade-built AI for most things

21% of respondents would remain cautious, and only 1% wouldn't trust it at all, indicating that it's vanishingly rare for trade teams to be uninterested in using AI to make their work better and their roles more manageable.

The main qualification trade leaders and teams have for using AI to get meaningful business outcomes is that it needs to integrate smoothly with existing trade software and stitch together fractured product data. A ChatGPT subscription won't suffice.

Trust in verifiable, catalog-applied AI



Would trust it for most things	46%
Would fully trust and adopt it	32%
Would stay cautious	21%
Still wouldn't trust it	1%

Base 230 respondents. All respondents.

"A deep and detailed AI with accurate predictability and sources to verify our products and their components would change our trade operation."

Sr. Manager, Industrials, reports to Supply Chain

"We need a trusted AI-enabled system with better data management, automation, and integration with existing tools."

Sr. Manager, Trade Compliance, Electronics & Semiconductors, reports to Supply Chain

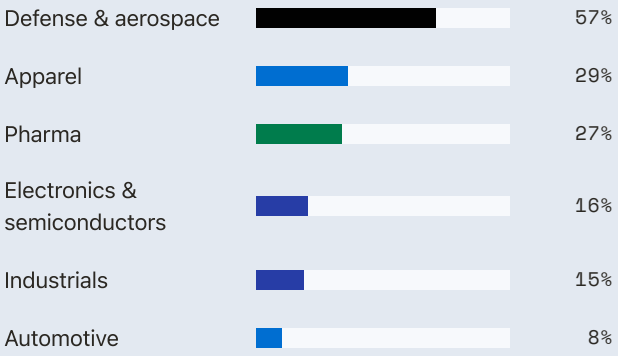
"If we could use AI to be truly 'trade ready' with a live product record and trusted tools, the business would move faster with fewer delays, penalties, and compliance surprises. For me, it would mean spending less time chasing data and firefighting and more time proactively managing risk and getting medicines to patients on time."

VP, Trade Compliance, Pharmaceuticals, reports to Operations

SURVEY INSIGHT

Trust in verifiable, catalog-trained AI lags in industries where denied party screening is the paramount trade concern — and is especially low in defense

Percentage of respondents saying they would 'stay cautious' or 'wouldn't trust' even a verifiable, catalog-applied AI system, by industry



Base 230 respondents.

57%

Of defense & aerospace respondents would stay cautious or wouldn't trust even a verifiable, catalog-applied AI system

10

POSSIBILITIES & PROMISE

Amid the demands of a challenging global trade environment, and even without a shared source of product truth, enterprise trade teams are largely confident their broker filings are accurate

As a surge in regulations and complexity has swamped brokerages with client work, enterprise trade teams remain confident that their broker filings would hold up to regulators' scrutiny.

93% of respondents are "very" or "somewhat" confident that their brokers' filings would hold up to scrutiny.

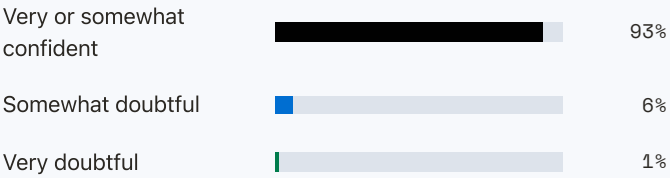
93%

Of respondents are very or somewhat confident their brokers' filings would hold up to scrutiny

6% are somewhat doubtful their filings would hold up. Only 1% are very doubtful.

While enterprise trade teams feel confident in their brokers' filings, they recognize that fractured, incomplete product data that lives in multiple locations increases manual work for all parties.

Confidence that broker filings would hold up to regulator scrutiny



Base 230 respondents.

"The most frustrating part of our broker relationships is that we both lack real-time visibility and consistency around product details, classifications, and documentation."

Director, Trade Compliance, Industrials, reports to Supply chain

"With no shared, real-time product data sync, our brokers rely on outdated component specs we send weeks prior to filing."

Director, Trade Compliance, Electronics & Semiconductors, reports to Supply chain

Over time, this lack of shared, real-time product and filing information results in days and weeks and months worth of emails to revise origin records, classification, and more. Sometimes, trade teams and their brokers realize all this endless, burdensome communication was to establish the exact same product details that have previously been determined, just for a different shipment.

"There are just too many back-and-forth requests for our team or our brokers to keep up with. We're all so busy, and there are so many asks for missing product details, classifications, origin information, or documentation."

Sr. Manager, Electronics & Semiconductors, reports to Supply chain

"No real-time data sync forces us to repeat sharing identical product details often."

VP, Trade Compliance, Industrials, reports to a standalone trade/compliance org

Trade-readiness means having defensible evidence behind every product's trade decision ready before it crosses the border.

When businesses are trade-ready, they are able to prep entries faster, avoid detentions, never overpay or underpay duties, and qualify for every trade preference, without extraordinary cost or loads of manual work. Enterprises that aren't trade ready struggle to prep complex, multi-tier products to cross borders without triggering denied party screening violations, overpaying or underpaying duties, or missing out on free trade agreement (FTA) qualification.

Trade readiness scores were determined for each of the 230 respondents through a composite of eight capability ratings, each scored themselves 1 to 5, normalized to 0 to 100 and banded against the fielded distribution. The eight areas are:

01 Maintaining a centralized record of products

02 Classification at complexity and volume

03 Broker and supplier communication

04 Communicating with and responding to inquiries from CBP

05 Responding to tariff and rule changes

06 Managing country of origin, FTAs, and duty calculations

07 Implementing AI at scale for trade work

08 Determining material composition for Section 232 and other component-based tariffs

As a result, a trade readiness score measures the distance between accountability and delivery.

WHO WAS SURVEYED

About the survey & respondents

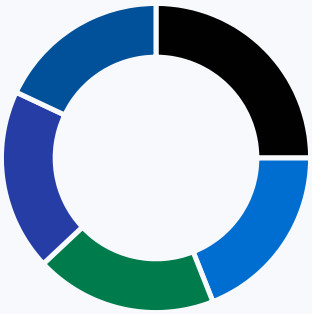
ROLE

25%

Of respondents are Sr. Managers / Managers of Trade Compliance, Global Trade, or Customs, the largest title group

Responses split across five title groups spanning the Manager-to-VP band, with no group larger than a quarter of the sample. Six in ten (62%) carry trade compliance, global trade, or customs titles; the rest (38%) run import/export operations or global logistics. One in four (25%) sits in the Sr. Manager/Manager layer.

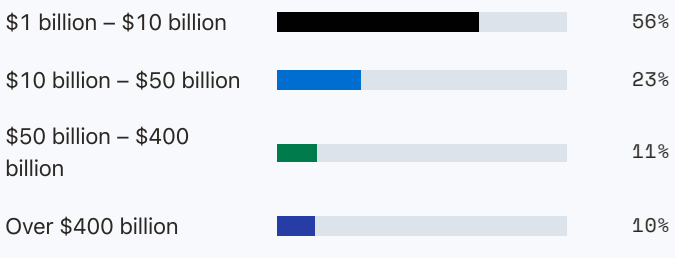
Role



Sr. Manager / Manager of Trade Compliance, Global Trade, or Customs	25%
VP / Head of Trade Compliance, Global Trade, or Customs	19%
Director / Manager of Import or Export Operations	19%
Director / VP of Global Logistics or Import/Export Operations	19%
Director of Trade Compliance, Global Trade, or Customs	18%

Base 230 respondents. All respondents.

Annual revenue



Base 230 respondents. All respondents.

REVENUE

56%

Of respondents work at companies with $1 billion – $10 billion in annual revenue

Every respondent works at a company with at least $1 billion in annual revenue: 56% in the $1 to 10 billion band, 23% in the $10 to 50 billion band, and 21% at $50 billion or more — including 10% above $400 billion.

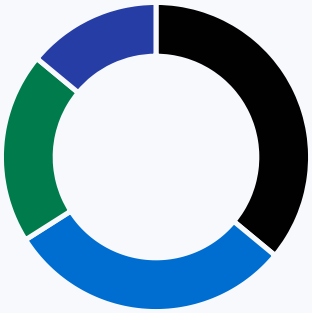
ANNUAL CUSTOMS ENTRIES

36%

Of respondents' companies file 10,000 – 50,000 U.S. customs entries a year

Every respondent's company files at least 10,000 U.S. customs entries a year. 36% file 10,000 to 50,000; 30% file 50,000 to 150,000. One-third (34%) file more than 150,000 customs entries, and one in five (20%) file more than 500,000.

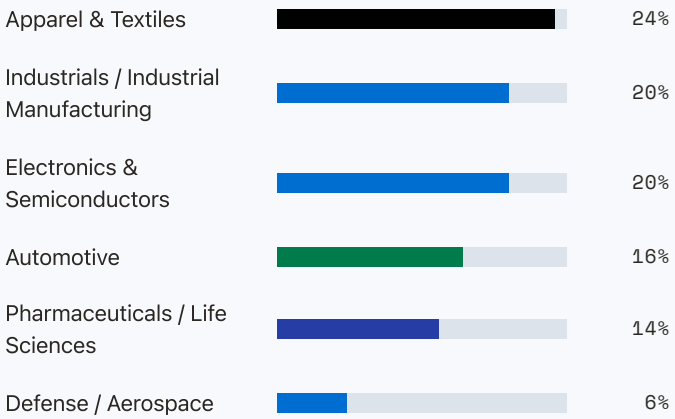
Annual U.S. customs entries



10,000 – 50,000	36%
50,000 – 150,000	30%
More than 500,000	20%
150,000 – 500,000	14%

Base 230 respondents. All respondents.

Primary industry



Base 230 respondents. All respondents.

PRIMARY INDUSTRY

24%

Of respondents work in apparel & textiles, the largest industry group

Respondents were spread across six industries: Apparel & Textiles (24%), Industrials / Industrial Manufacturing (20%), Electronics & Semiconductors (20%), Automotive (16%), Pharmaceuticals / Life Sciences (14%), and Defense / Aerospace (6%).

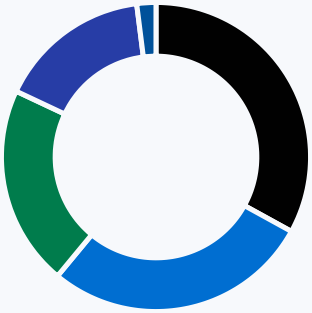
SIZE OF TEAM

33%

Of respondents have 16–50 people on their trade/customs team

One-third of respondents (33%) have 16 to 50 people on their trade/customs team; 28% have more than 150. Roughly half (49%) sit on a team larger than 50. Only 2% of respondents work on a team of five or fewer.

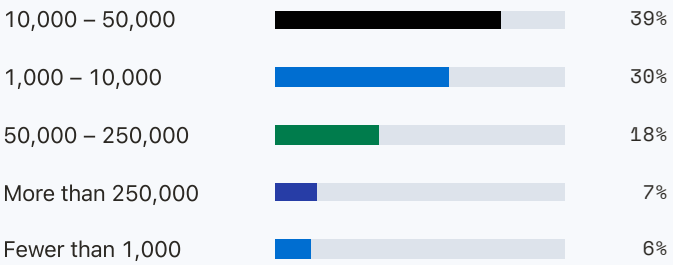
Size of trade/customs team



16–50	33%
More than 150	28%
51–150	21%
6–15	16%
1–5	2%

Base 230 respondents. All respondents.

Active product classifications maintained



Base 230 respondents. All respondents.

ACTIVE PRODUCT CLASSIFICATIONS MAINTAINED

39%

Of respondents maintain 10,000 – 50,000 active product classifications

Nearly two-thirds of respondents (64%) maintain at least 10,000 active product classifications, and one-quarter (25%) maintain 50,000 or more. The largest single group (39%) maintains between 10,000 and 50,000 product classifications. Just 6% maintain fewer than 1,000.

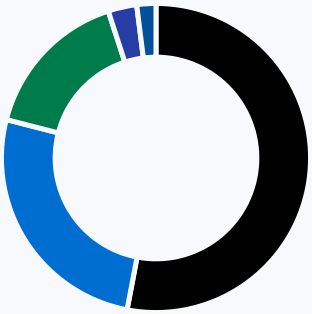
SHARE OF TRADE BUDGET TO BROKERS/CONSULTANTS

53%

Of respondents route 10–25% of their trade budget to brokers/consultants

8 in 10 (82%) respondents route at least one-tenth of their trade budget to outside brokers and consultants, but only 29% route a one-quarter or more. Only 3% spend more than half of their budget on brokers and consultants; 16% spend under 10%.

Share of trade budget to brokers/consultants



10–25%	53%
25–50%	26%
Under 10%	16%
More than 50%	3%
Not sure	2%

Base 230 respondents. All respondents.

Methodology

Altana and the American Association of Exporters and Importers (AAEI) fielded this survey of 230 trade professionals at enterprise businesses in July and August of 2026.

To qualify, a respondent had to:

- → Hold a Manager- through VP-level role in trade compliance, global trade, customs, or import/export operations
- → Directly own or oversee customs compliance and/or brokerage operations
- → Work at an enterprise physical-goods importer with at least $1 billion in annual revenue and a meaningful import-export business
- → File at least 10,000 U.S. customs entries a year

Excluded from the survey were C-suite executives, sourcing and procurement leaders, responsible-sourcing owners, and anyone employed by a customs broker or trade consultancy

Research powered by gather