

Tariff Recovery

Beyond the Customs Entry: Identifying Tariff Recovery **Opportunities**

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TIME TO SHIFT OUR THINKING

Direct recovery follows the entry.

SUPPLIER RECOVERY follows the money.



Two recovery paths

The payment route determines which records and process to examine.



PATH 2

Supplier recovery

You paid a supplier

Tariff-related charge
Commercial evidence
Supplier reconciliation
Supported credit or cash

Each path requires its own evidence and review.

Customer ABC supplier recovery opportunity

Initial model uses a $1.71B addressable supplier-spend estimate

$1.71B

Addressable spend

Scope and period to confirm

5% to 15%

Exposure assumption

5%, 10%, and 15% scenarios

$25.7M to $153.9M

Modeled recovery range

Not a verified recovery balance

Model basis

The scenarios apply estimated embedded tariff exposure of 5%, 10%, and 15%, followed by recovery rates of 30%, 50%, and 60%. Customer records must validate the spend base and supplier-level exposure.

Source: management-provided modeling inputs. Addressable supplier spend: $1.71B. Exposure and recovery percentages are assumptions.

Modeled scenarios only. These amounts are not verified recoverable balances.

Recovery economics

Addressable supplier spend × embedded tariff exposure × estimated recovery rate

MODEL INPUTS AND SCENARIOS

Direct charges

Tariff or duty line items

Embedded increases

Supplier price and landed-cost changes

Freight and offsets

Freight, credits, and invoice offsets

Case	Addressable spend	Embedded tariff exposure	Estimated recovery rate	Potential recovery
Low	$1.71B	5%	30%	**$25.7M**
Mid	$1.71B	10%	50%	**$85.5M**
High	$1.71B	15%	60%	**$153.9M**

Confirm the $1.71B supplier-spend scope against Customer ABC records. Validate tariff-linked amounts through invoices, purchase orders, supplier records, and credits.

Illustrative assumptions: embedded exposure of 5% / 10% / 15% and recovery rates of 30% / 50% / 60%. Not company-disclosed results.

Potential recovery = $1.71B addressable supplier spend × estimated embedded tariff exposure × estimated recovery rate.

Recovery starts as a tightly wound mess

One thread at a time

Connect the evidence. Untangle the economics. Recover the cash.



Proposed review workflow

A focused review with customer approval at each outreach step

01

Confirm scope

Confirm the $1.71B spend scope and included categories

02

Map suppliers

Map suppliers, products, origins, and relevant entities

03

Trace cost changes

Trace costs, credits, and changes over time

04

Size recovery

Support each amount with evidence

05

Approve outreach

J.B. Hunt approves any supplier contact

No supplier is contacted until customer approves the supporting evidence and outreach plan.

Where tariff-related supplier costs may appear

Tariff-related costs may appear under broader pricing or cost categories

01 **Explicit tariff surcharges**

A separately stated charge

02 **Delivered-cost pricing**

Duties included in delivered-cost pricing

03 **Freight and logistics charges**

Import-related costs included in broader charges

04 **Tariff-related price increases**

Compare effective dates, supplier explanations, and supporting records

05 **Unreconciled credits or offsets**

Reconcile credits and offsets against price increases

Supplier and invoice records show whether customer absorbed tariff-related cost changes.



Supplier relationships remain protected

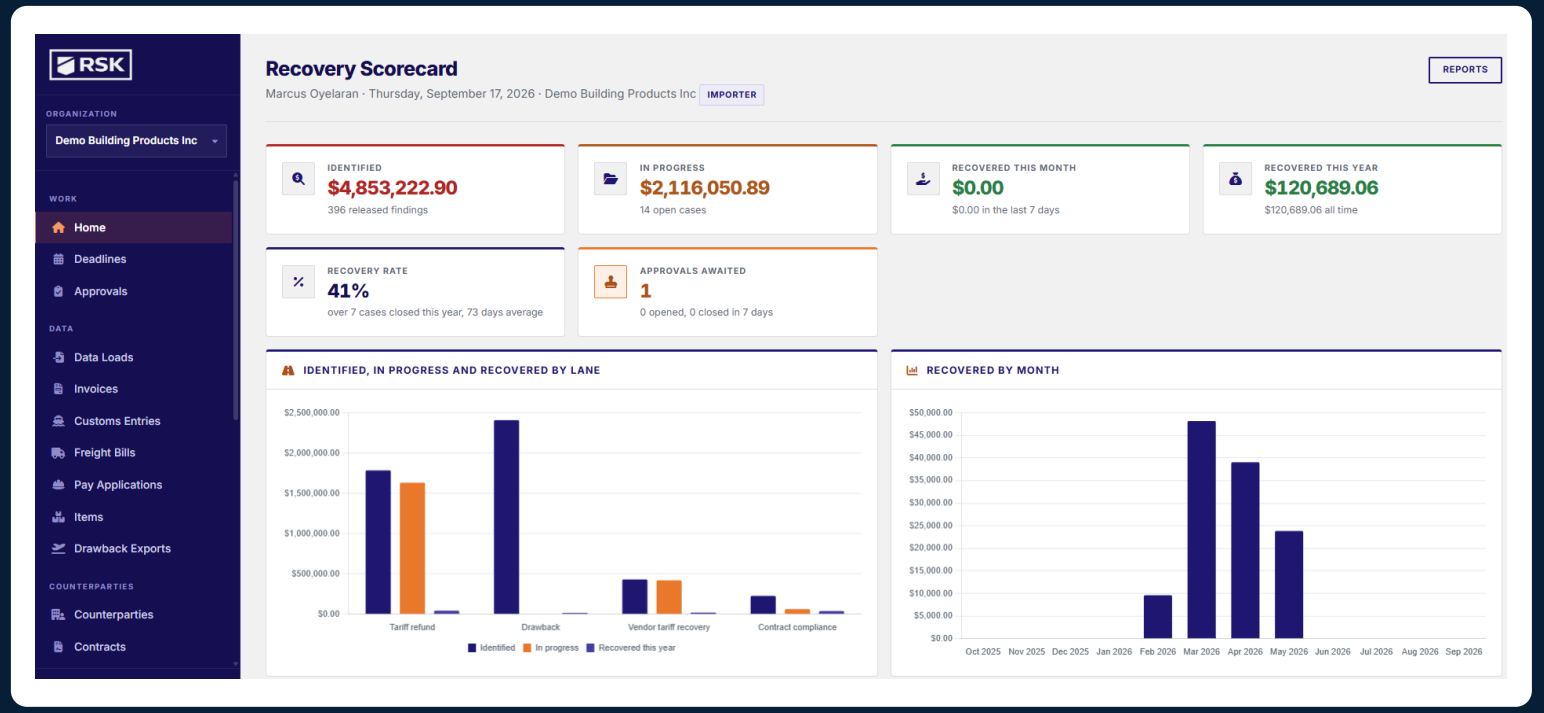
Evidence and approval guide supplier outreach

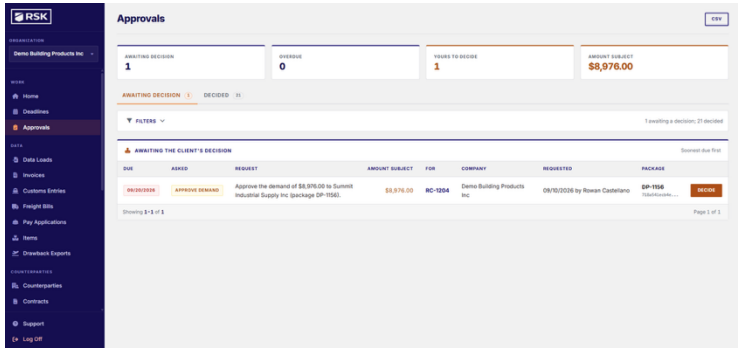
01	**Evidence before outreach**	RSK documents the commercial basis before outreach
02	**Customer approves every contact**	No supplier is contacted without approval
03	**Commercial reconciliation**	Initial requests focus on facts and reconciliation
04	**Escalation only when justified**	Customer controls supplier relationships and escalation

Resolve supported issues while protecting supplier relationships.

Clarity turns fragmented data into action

Recovery scorecard and approval workflow





CENTRALIZED RECORD

CONTROLLED APPROVALS

EXECUTIVE VISIBILITY

Potential recovery outcomes

Supported recovery may produce different commercial outcomes

01

Cash recovery

02

Credits

03

Invoice offsets

04

Pricing adjustments

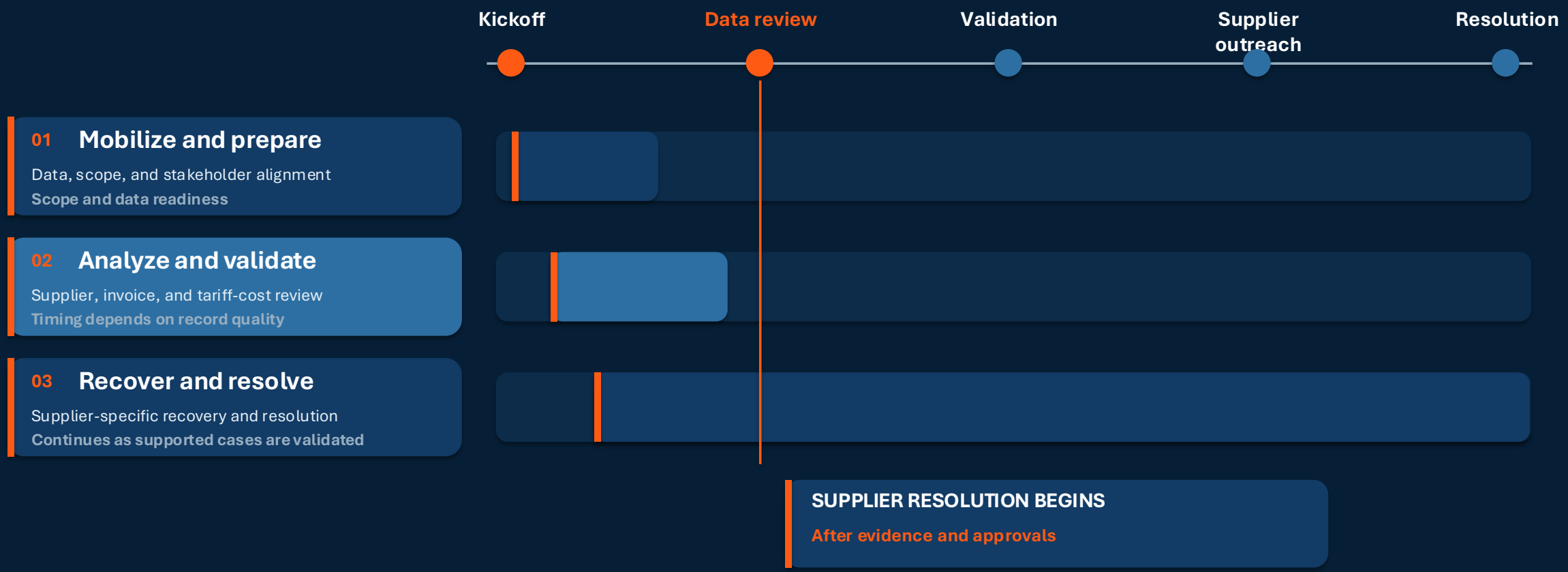
05

Contract terms

The appropriate resolution depends on the evidence, contract terms, and supplier relationship.

Program timeline

Workstreams can overlap. Calendar timing depends on data access and supplier response.



Timing depends on data access, supplier responsiveness, and customer approval.

Relevant operating experience

Historical recovery operations built before RSK's tariff recovery offering

7,500+

Businesses served

$3.5B+

Recovered for clients

Under 2 years

Built and executed at speed

Historical Stenson Tamaddon results. These are not RSK tariff recovery results.