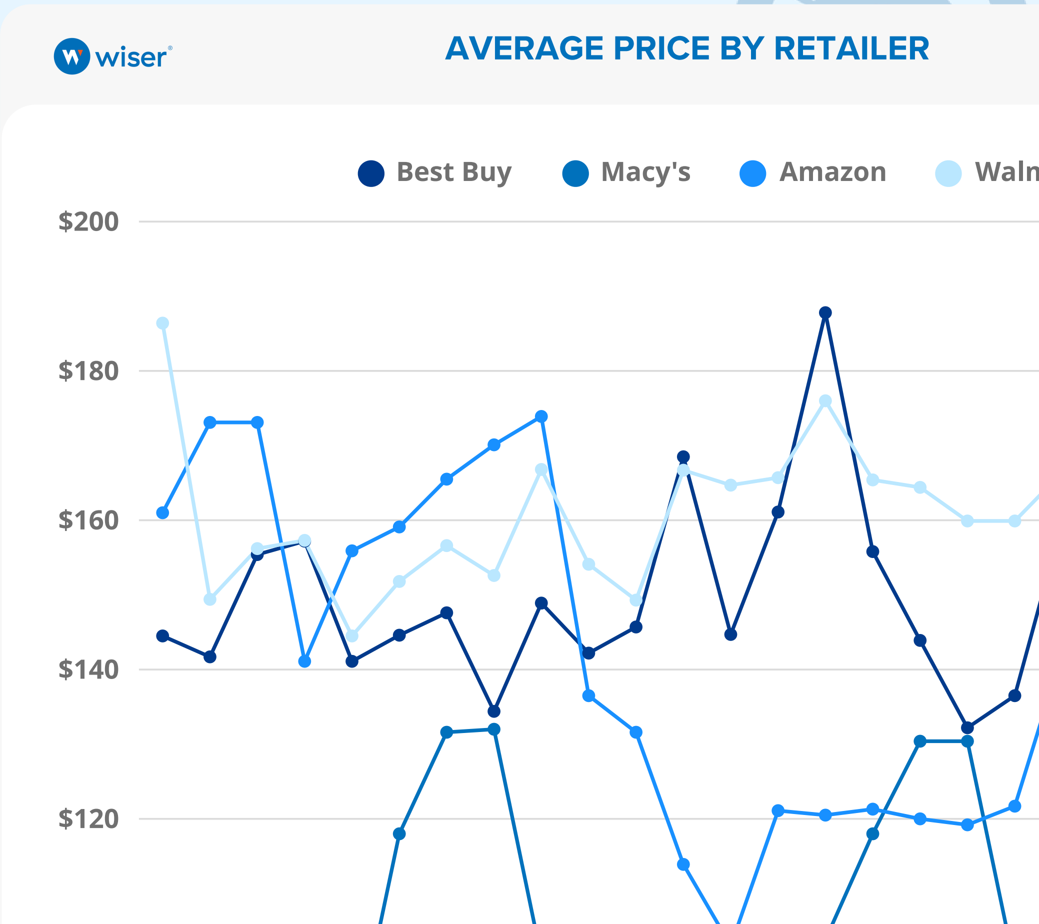
2025 REPORT

Pricing Under Pressure: The Tariff Fallout in Computer Peripherals

Jan - June 2025



Tariff Turbulence and Retail Pricing: A Fragmented Response

Since early-2025, tariff-related tensions between the U.S. and China has triggered new waves of uncertainty across global trade. While these measures were expected to drive broad price inflation in Consumer Electronics, the Computer Peripherals market responded in fragmented ways.

Across U.S. retailers, pricing strategies varied: some absorbed costs, others passed them on to consumers. The result isn't consistent with inflation, but a patchwork of price hikes, discounts, and volatility.

For pricing teams, this means the tariff environment no longer creates predictable outcomes.

Key Findings:

- **No One-Size-Fits-All Pass-Through:** While tariffs impacted all retailers, responses varied. Amazon raised prices in every category (an average of +19%), while Walmart cut them in four out of five. This indicates retailers are optimizing for margin, not simply reacting to cost inputs.

- **Category Drives Strategy:** Import-heavy segments like Imaging and LCD Monitors saw the highest price increases (+25% Best Buy, +41% Amazon). In contrast, commoditized categories, like Printers and Storage, experienced price declines, even in the face of tariffs.

- **Tariff Impact is Real, But Often Masked:** Across categories, retailers appear to be absorbing or selectively transferring tariff-related costs. For brands, this means ongoing uncertainty: the same product may be up 40% at one retailer and down at another.

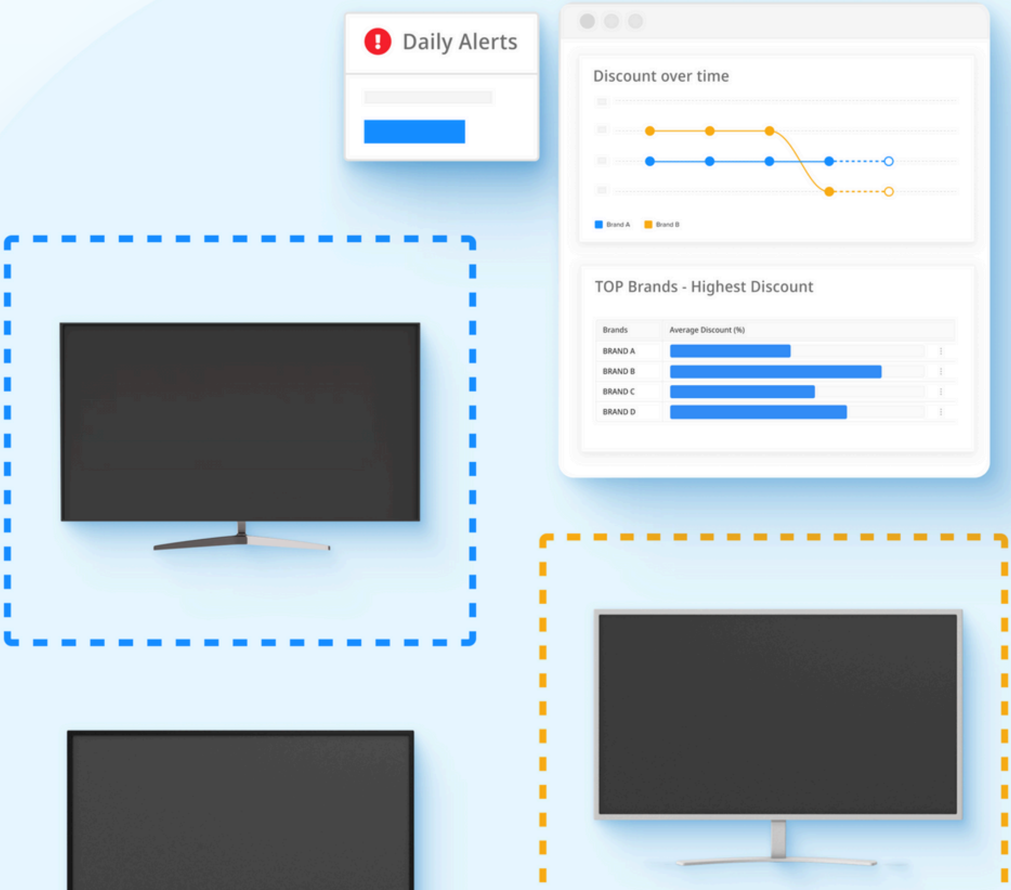
- **Pricing Strategies Are Diverging:** Retailers aren't moving in sync; instead, they're often running different strategies.

Scope:

This reports analyzes assortment and pricing trends across four retailers: Walmart, Macy's, Amazon and Best Buy. We looked at the **Computer Peripherals** category, covering the period from 01/05/2025 to 06/22/2025.

GLOBAL TARIFFS REPORT

COMPUTER PERIPHERALS

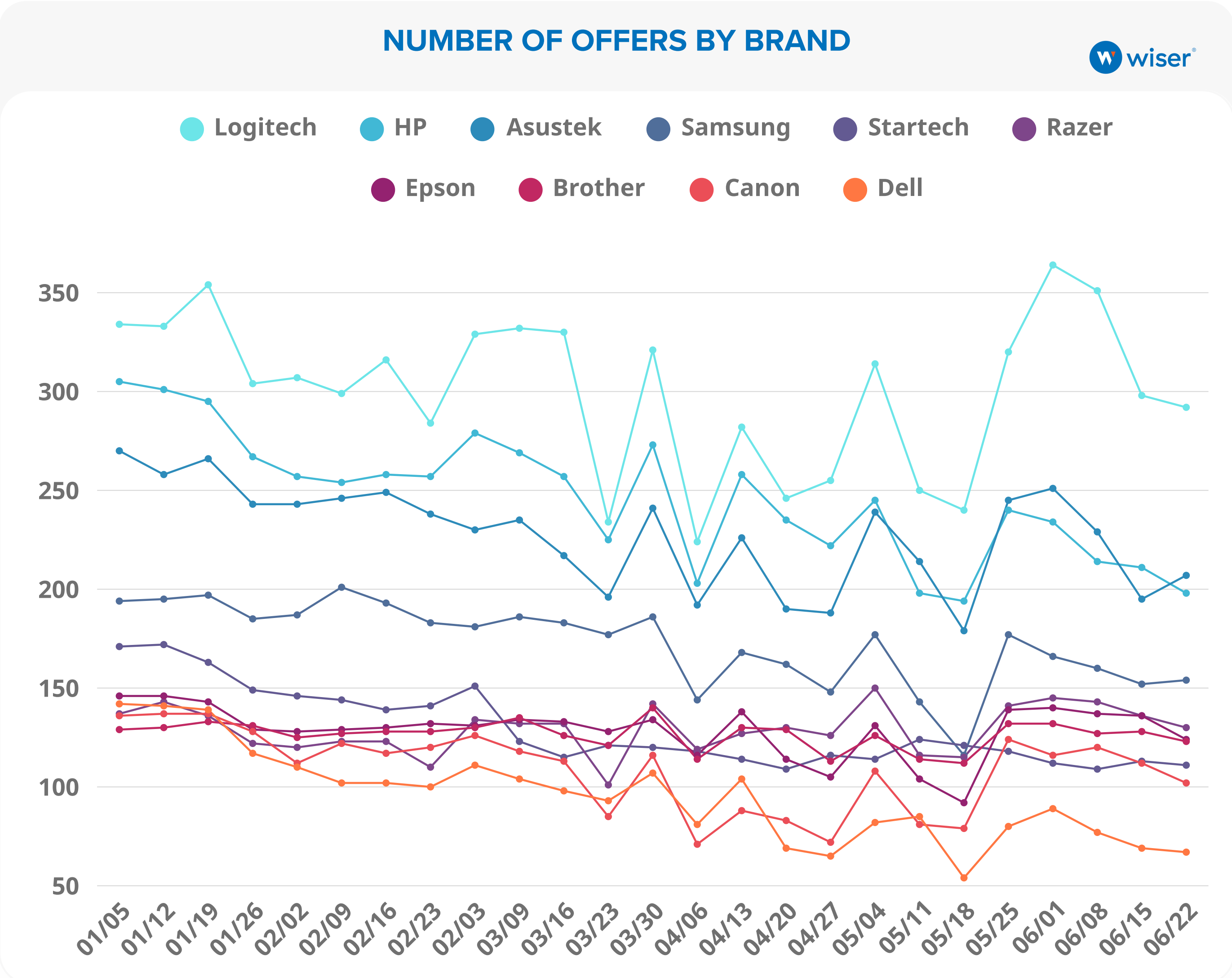


When Supply Falters: How Tariffs Sparked a Category-Wide SKU Pullback

Since January, the Computer Peripherals category has seen a sharp and sustained reduction in the number of products available online, with disruption accelerating in March. This timing aligns with the latest round of regulatory shifts and tariff implementations, and the data shows just how unevenly brands have been affected.

- **Dell** saw the steepest decline, with a dramatic 53% drop in available offers. This suggests either severe supply chain disruption or a strategic retreat from certain SKUs.
- **HP** and **Startech** also recorded significant contractions (both over -35%), signaling a broader shakeout among legacy brands in this space.
- Only **Brother** and **Canon** saw declines under 10%, underscoring just how widespread and severe the reduction in offer volume has been across the category.

The magnitude of decline highlights the operational risks of relying on single-region sourcing or just-in-time logistics. This sets the stage for the pricing power shifts explored in the next sections.

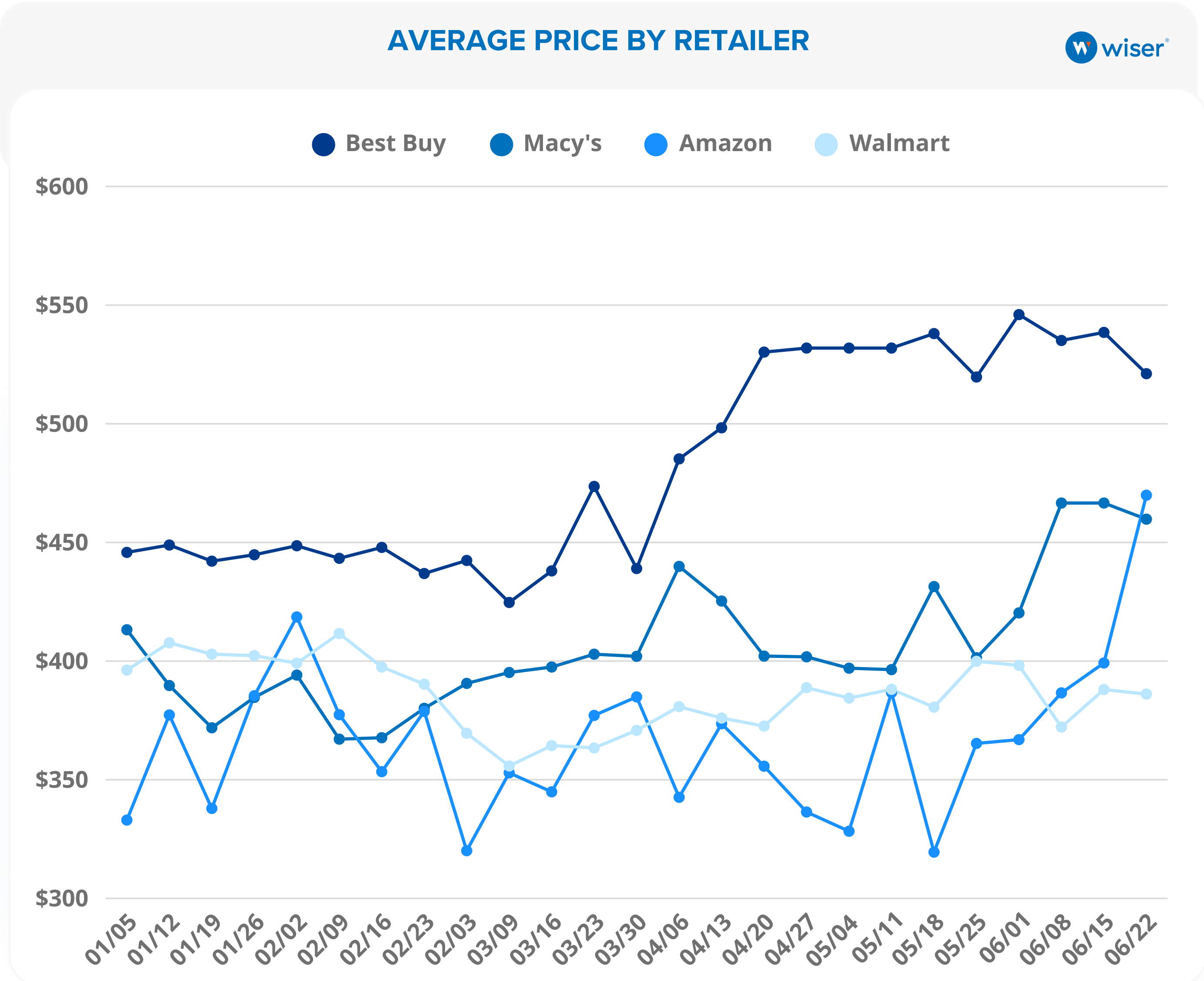


Retailer Pricing Strategies Split as LCD Monitor Prices Jump

The LCD Monitors category saw aggressive pricing shifts across major retailers, with **Amazon** and **Macy's** leading a sharp upward trend.

- **Amazon** saw a price increase of 41%, closing the period with an average price of $469.90, second only to Best Buy.
- **Best Buy** saw a 17% rise, maintaining its position as the category's highest-priced retailer.
- **Macy's** saw an 11% price increase, with price acceleration beginning in early June.
- **Walmart** was the only retailer to lower prices (3%), keeping its strategy defensive and price-focused.

These movements signal a divergence in retailer strategy: **Amazon** and **Macy's** appear to be monetizing tighter supply through higher price points. **Walmart's** consistent pricing may be aimed at maintaining share through affordability.



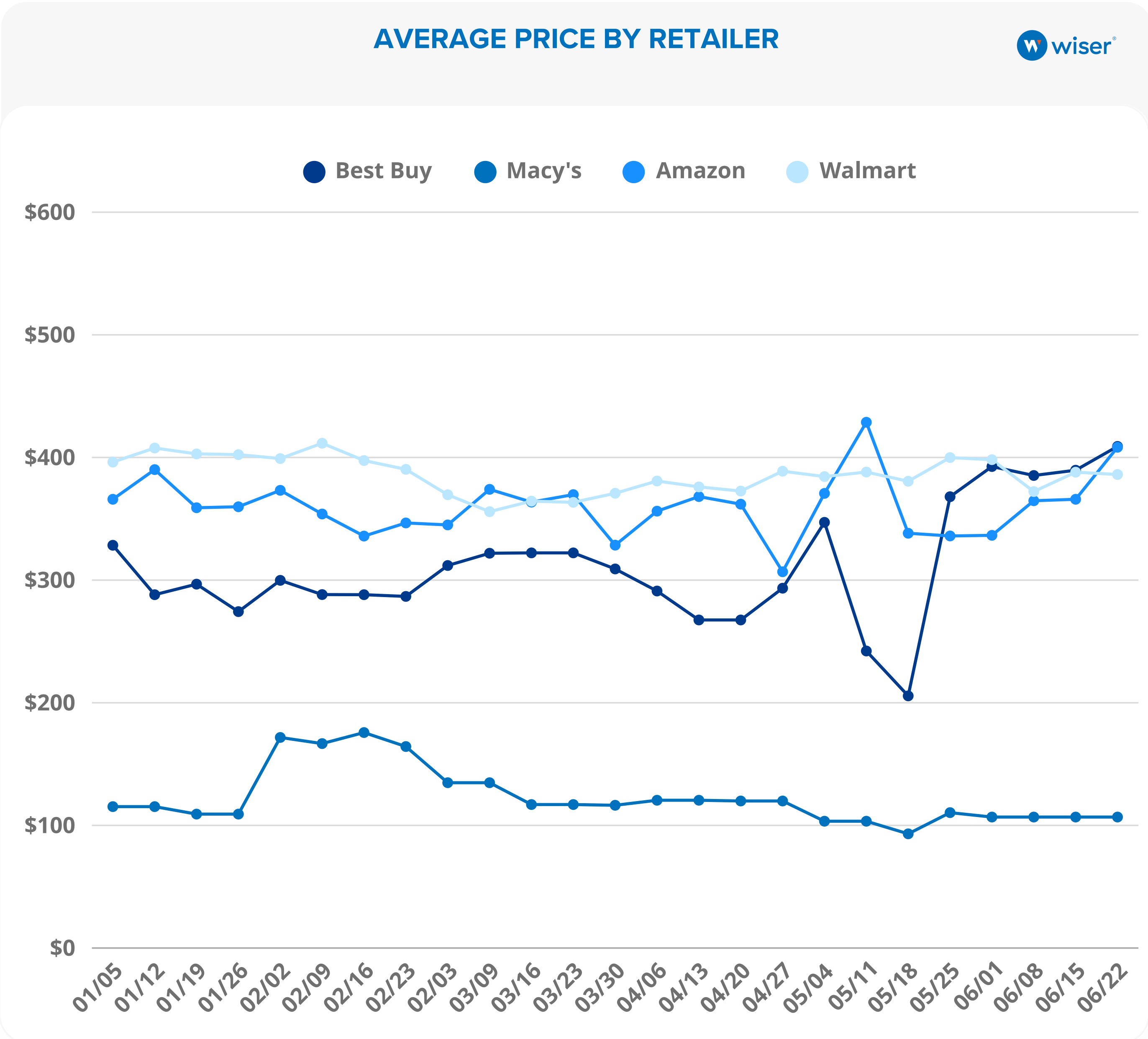
Imaging Pricing Trends Reveal Fragmented Response to Tariff Pressure

The Imaging category is mixed in it's response to pricing pressure.

- **Best Buy** raised prices by 25%, the most significant increase in the category, suggesting either a tariff pass-through or a mix shift toward higher-end devices.

- **Amazon** followed with an 12% increase, consistent but less aggressive.

- **Walmart** showed a slight decline of 3%, despite brief mid-season increases; its final pricing position remains nearly flat. **Macy's** also dropped prices by 7%, but not as smoothly. Prices jumped more than 60% from January to mid-February, then fell just as quickly, pointing to assortment instability rather than clear strategy.

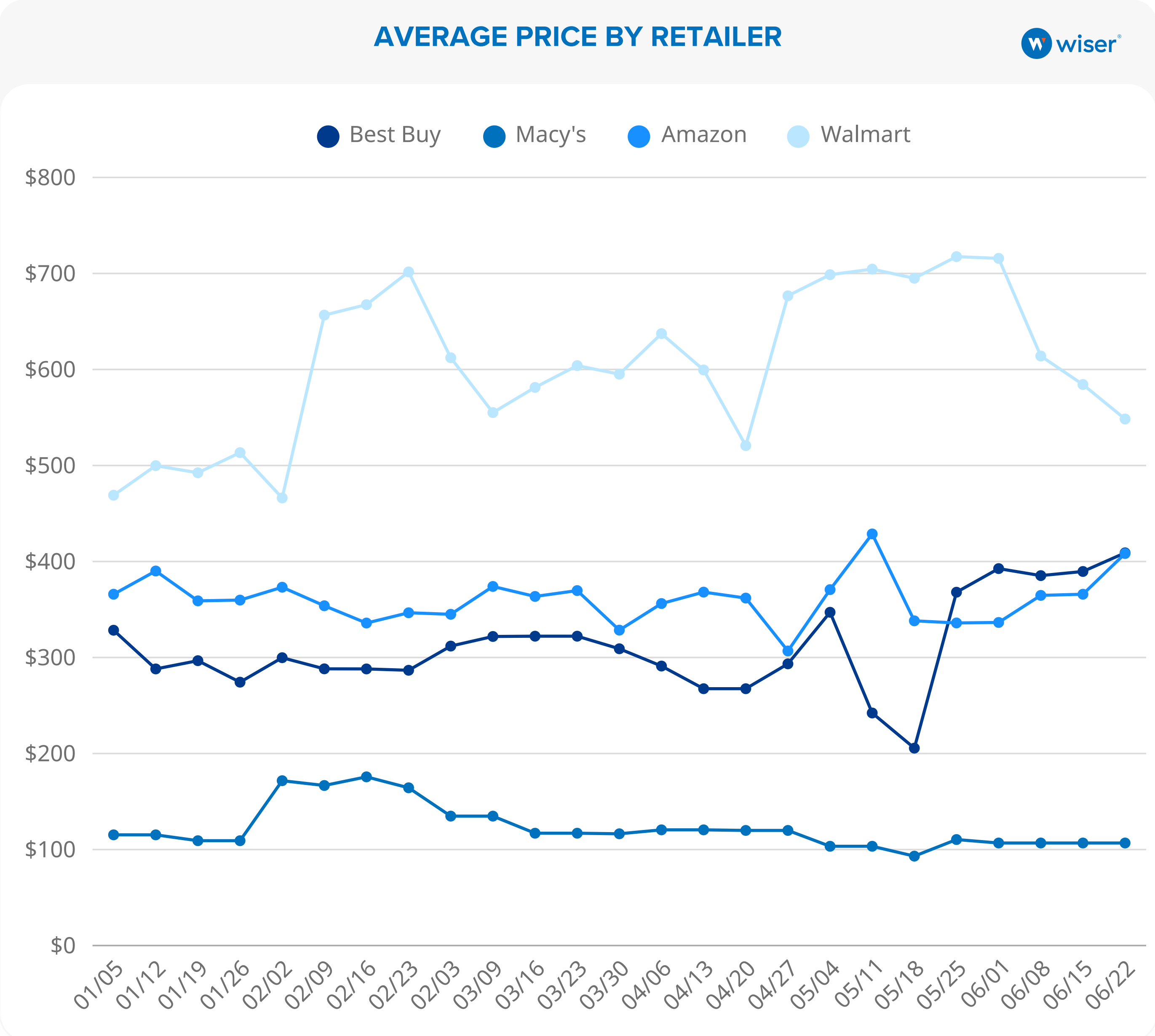


Networking Prices Climb as Retailers Pass On Tariff Costs

In the Networking category (modems and routers), retailers steadily increased prices throughout the first half of 2025.

- **Best Buy** led with a 25% increase. A brief dip in mid-May likely reflects a short-lived clearance cycle or temporary assortment shift before prices rebounded sharply.
- **Amazon** also saw steady growth, with prices rising 12% over the period. **Walmart's** trend was more volatile, but overall, its average pricing climbed 17%.
- **Macy's** dropped prices by 7%, even as tariff pressure affected peers

These movements suggest that most retailers are using pricing to absorb rising import costs tied to tariffs, rather than relying on promotions or cutting margins. The Networking segment, often stocked with imported, mid-value SKUs, is particularly exposed to tariff volatility.

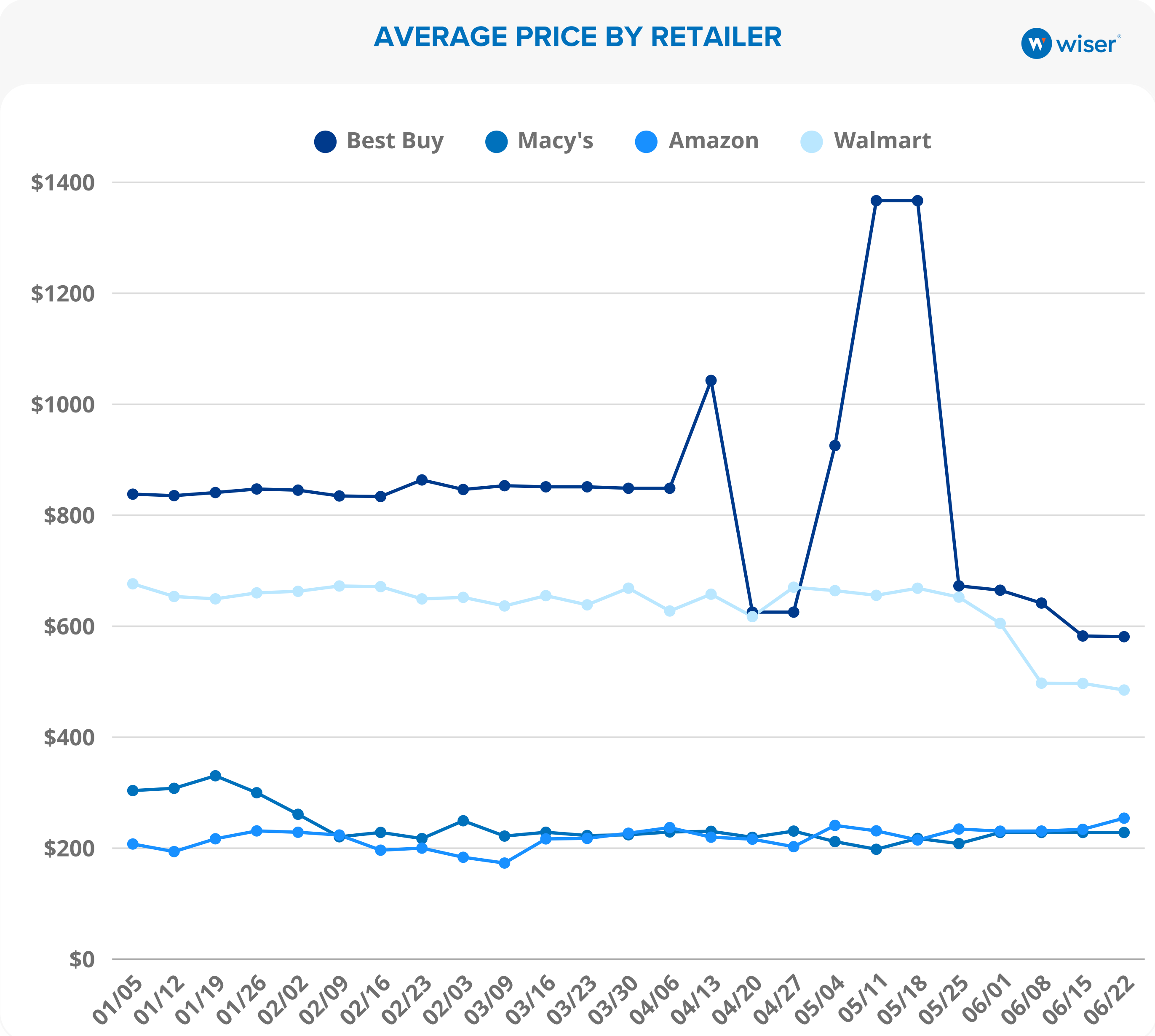


From Surge to Slide: Printer Prices Swing Sharply at Best Buy Amid Supply Disruptions

The Printer category stands out for its sharp, short-lived price shock, likely driven by tariff-related disruptions in supply and product mix.

- **Best Buy** prices surged more than 80%, peaking above $1,300 in mid-May before collapsing back below $700 by early June. **Walmart** and **Macy's** also showed declines (although less dramatic) of 28% and 25% respectively.
- **Amazon** broke from the pack, increasing prices by 22%, moving from the lowest average price in January to the second highest by June

This sudden volatility likely reflects the impact of tariff-related cost increases and temporary inventory constraints. Retailers appear to have responded by passing costs through to consumers,before restabilizing once supply corrected.



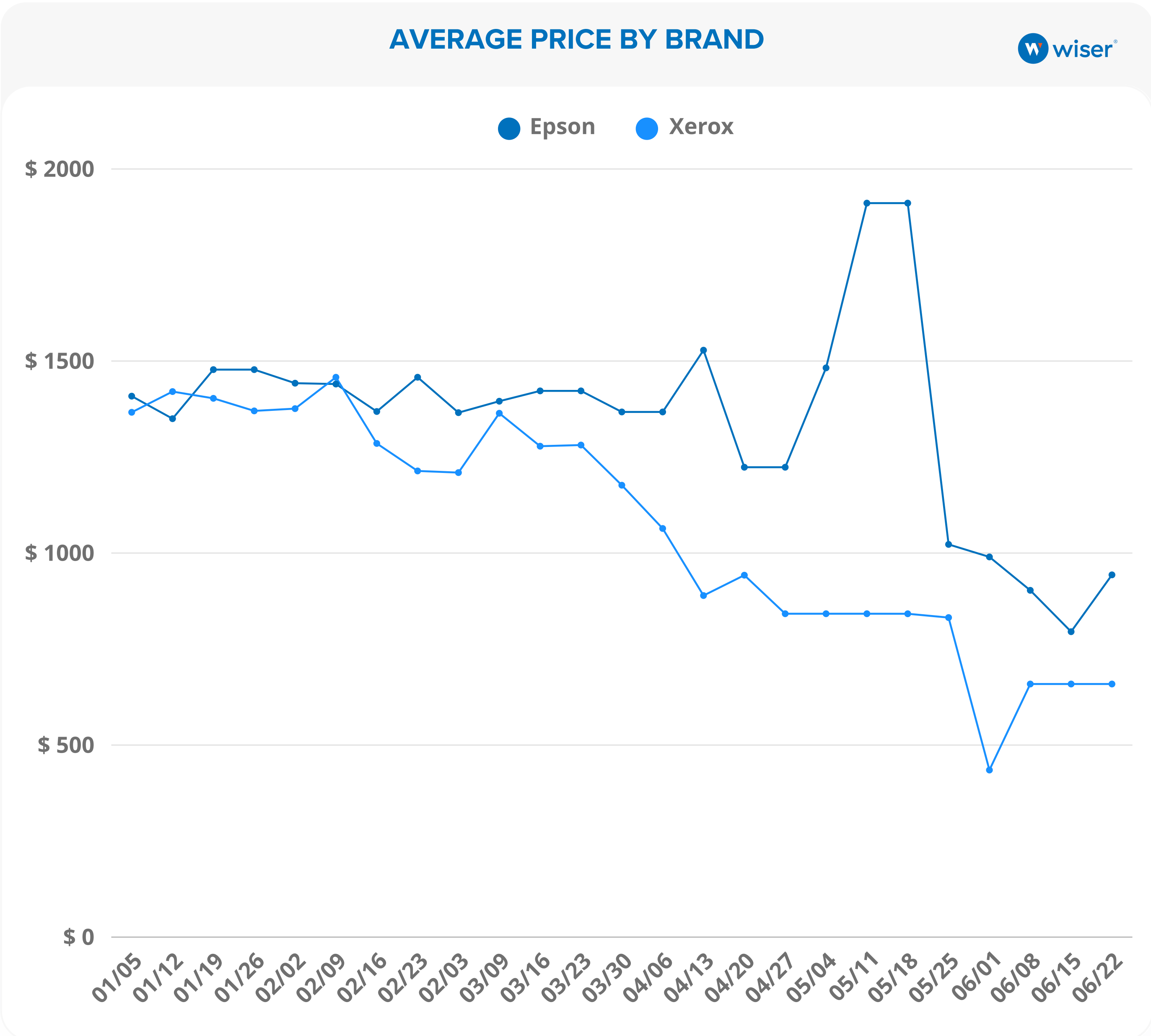
Extreme Moves in Printer Pricing: Epson Swings Up, Xerox Slows Down

Among printer brands, **Xerox** and **Epson** saw the most extreme price movements, with **Epson** mirroring the spike at Best Buy.

- **Epson** shows extreme mid-year volatility, with prices surging from $1,367 in April to $1,911 in May - a 40% spike - before declining by late June. This could just reflect an overcorrection in response to increased import costs.

- **Xerox** took the opposite route, with prices falling gradually across the period, from $1,366 in January to just $659 by June, without any dramatic peaks. This points to a steady push toward lower-priced models, potentially to maintain velocity or adapt to retailer pricing pressure.

Together, these trends highlight how tariffs don't create a single playbook: brands either lean into pricing power or pull back to stay competitive.

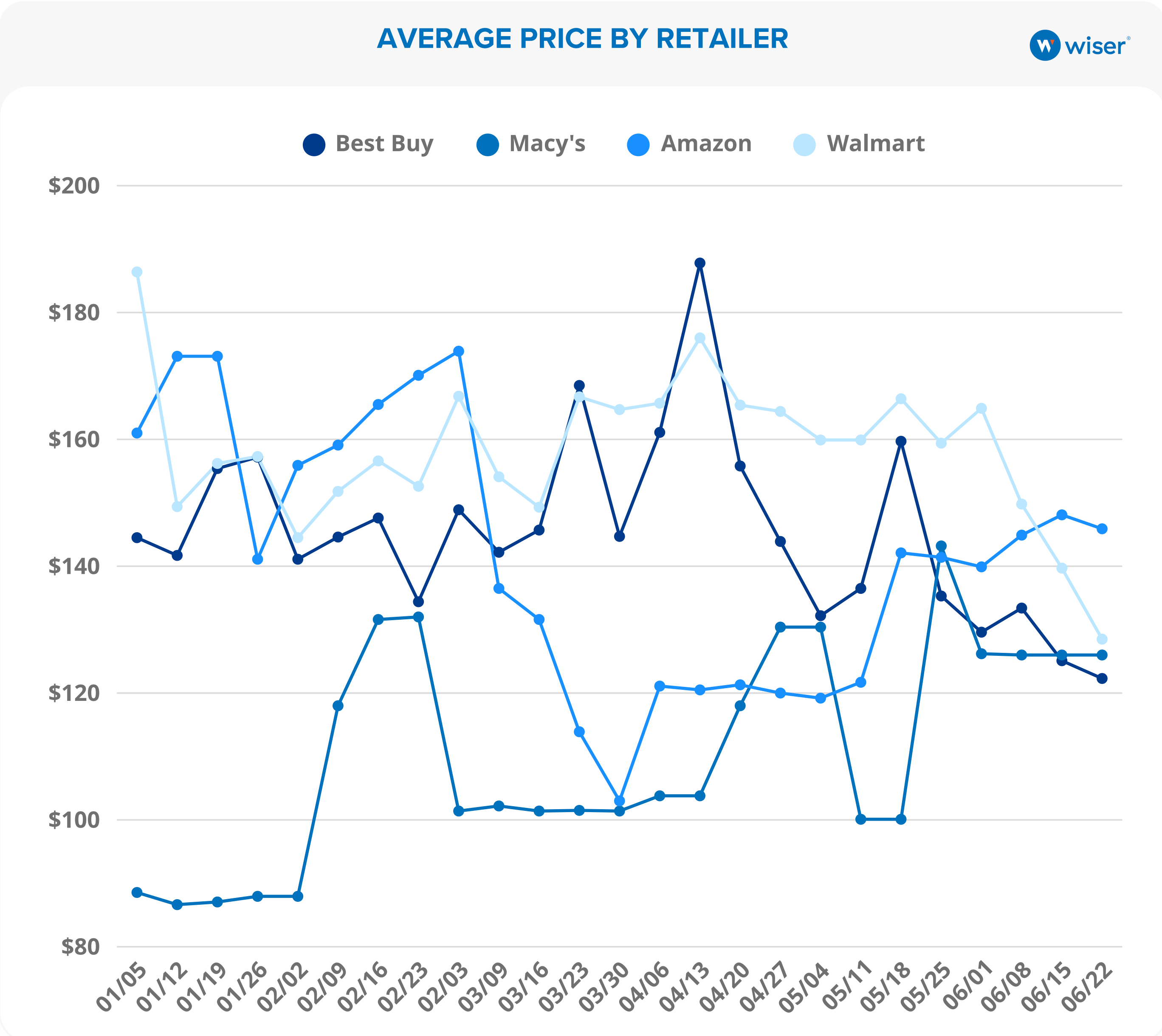


Storage Category Shows Most Extreme Retailer Pricing Disorder

No other category in this report shows the level of pricing disorder found in Storage. While tariffs may have triggered the initial disruption, retailers' inconsistent responses amplified the volatility.

- **Best Buy** jumped from $134 to $188 to $122, with sharp peaks and valleys throughout. A brief spike in mid-April was followed by a 35% drop in just eight weeks.
- **Macy's** started at $86 and more than doubled to $143, only to collapse by June. **Amazon** fluctuated between $103 and $173, with no clear trend often reversing direction week to week.
- **Walmart**, usually the stabilizer, showed a gentle decline overall but still veered erratically in the $128–$186 range.

Tariffs may have hit at different times for different SKUs (external drives, SSDs, flash storage, etc.), creating ripple effects across inventory, and, with the growing uncertainty, retailers responded based on short-term assortment availability, not long-term category strategy.



Conclusion: Tariffs Trigger Diverging Retailer Playbooks Across Categories

This table captures a clear truth: there is no single "tariff strategy." Retailers have reacted with vastly different pricing behaviors depending on the category, and their broader positioning.

AVERAGE PRICE CHANGES BY RETAILER

	LCD Monitors	Imaging	Networking	Printers	Storage
BEST BUY	+17%	+25%	+25%	-31%	-15%
macy's	+11%	-7%	-7%	-25%	+42
amazon	+41%	+12%	+12%	+22%	-9%
Walmart	-3%	+17%	-3%	-28%	-31%

- **Tariffs didn't cause uniform inflation, they exposed strategic gaps:** we expect tariffs to trigger a clean, upward pricing trend, but the data tells a different story. Retailers chose their battles, absorbing costs in some categories while raising prices in others. Inflation is no longer predictable or even directional, it's selective.

- **Some categories absorbed shock, others amplified it:** printers and storage saw the steepest price drops overall, suggestion fierce competition and higher price sensitivity. In contrast, LCD monitors and networking saw frequent increases, possibly due to tighter global supply chains and greater willingness to pay among home-office or SMB buyers.

- **Volatility introduces blind spots:** some categories swung as much as 30–40% over a six-month window. Even retailers known for pricing consistency (e.g. Walmart) adjusted sharply in some cases. This level of volatility destroys historical baselines for promotion planning, price anchoring, and channel strategy.

About Wiser Solutions

Wiser is the retail intelligence platform built to help brands and retailers win at the decision point—the moment a shopper chooses to buy or walk away. Our platform combines real-time data with category-specific expertise, enabling teams to act faster, optimize execution, and make smarter, more confident decisions. Whether online or in-store, Wiser turns visibility into action where it matters most.