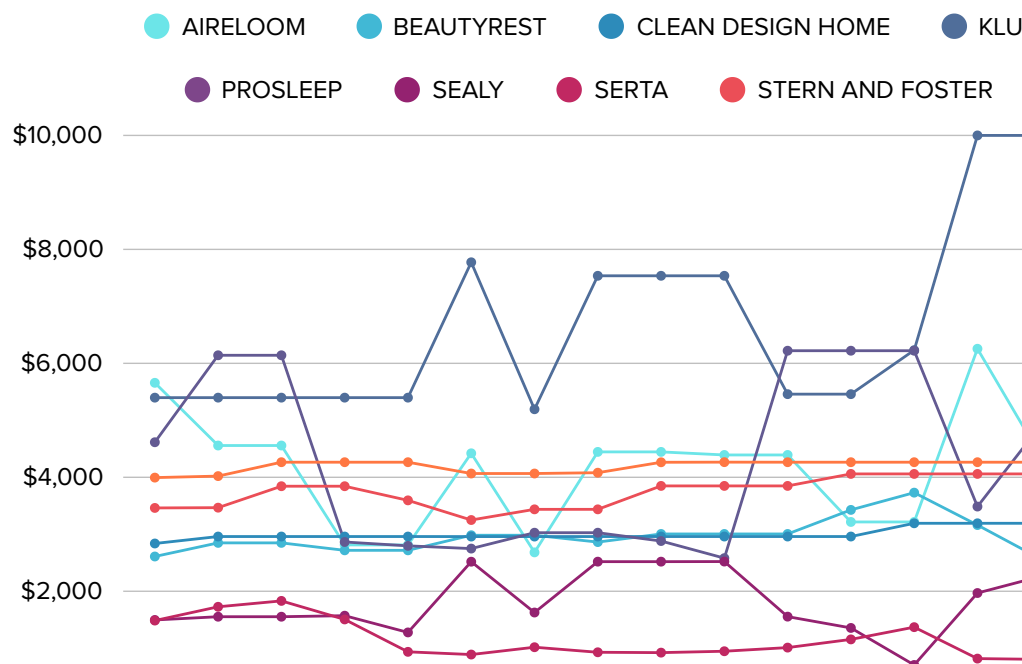


# 2025 Furniture Tariff Impact Report: Tracking Pricing, Supply Response, and Brand Behavior

## AVERAGE PRICE BY BRAND



# Executive Summary:

Furniture was among the categories expected to feel the brunt of recent tariffs, given its heavy reliance on raw materials like wood, metal, and foam, many of which were subject to increased import duties starting in early 2025. These inputs make up a significant portion of production costs, especially for categories like chairs, mattresses, and tables. In theory, higher input costs should translate into higher consumer prices.

Yet pricing data from January to May 2025 reveals a different story. The U.S. online furniture market did not see a uniform or inflationary surge. Instead, brands and retailers leaned into tactical pricing behaviors that absorbed or delayed cost pressures, using tools such as assortment rotation, promotional resets, and strategic mix shifts to maintain price stability or mask increases.

While some price points did rise, they did so in non-linear and inconsistent ways, highlighting a complex pricing environment shaped more by commercial strategy than direct policy reaction. This analysis focuses on three core furniture categories - chairs, mattresses, and tables - and uses SKU-level pricing data to reveal how tariff impacts may be mitigated behind the scenes.

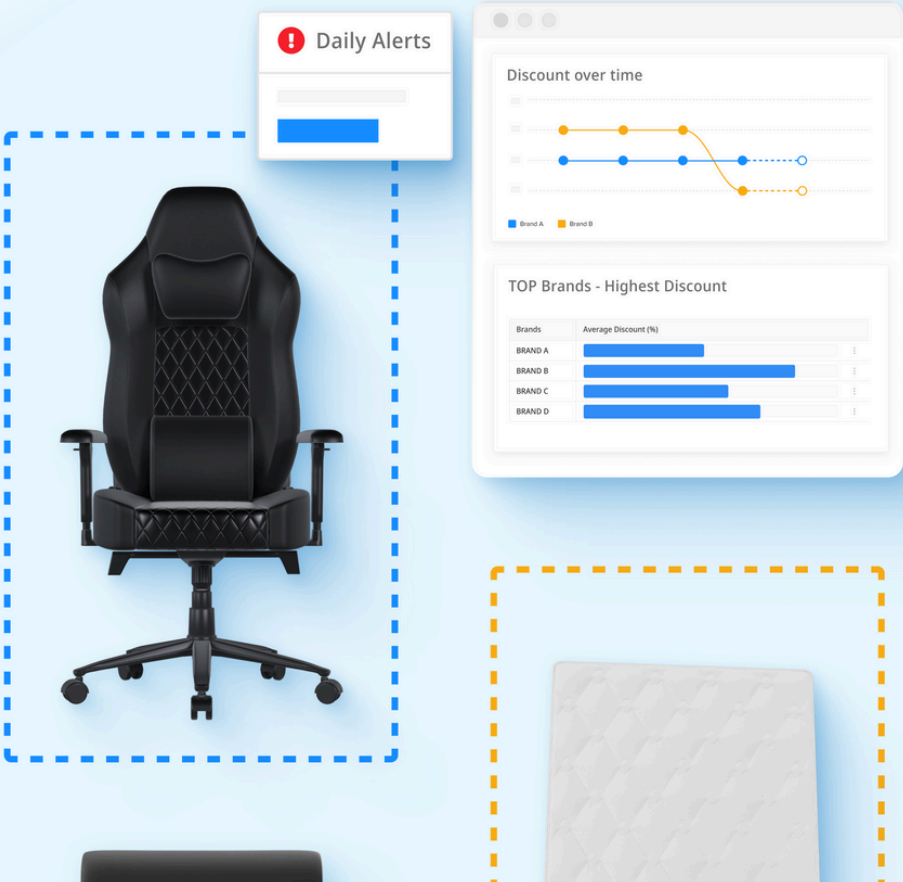
## Key Findings:

- **V-Shaped and Stepwise Trends Dominate:** Rather than slow, inflationary price hikes, most brands displayed volatile, nonlinear price behavior. Prices often dropped abruptly, then rebounded just as sharply. These V-shaped and stepwise patterns are characteristic of assortment resets, clearance cycles, or margin-targeted promotions, not direct tariff pass-through.
- **Cost Pressure Is Likely Being Managed Internally:** Retailers and brands showed signs of absorbing or deferring tariff-related cost increases. Pricing volatility was often tied to inventory shifts or category repositioning, rather than blanket increases. This suggests the use of internal levers to protect shelf price, especially in price-sensitive segments.
- **Tariff Effects May Be Delayed or Hidden:** The full cost burden of tariffs may not yet be visible at the shelf. Instead, short-term tactics are obscuring the pressure. Recent announcements from major retailers (such as Walmart) about future price hikes further support this theory: tariff impacts may manifest gradually, requiring ongoing, SKU-level tracking to detect when and how they are passed to the consumer.

## Scope:

This report aims to analyze pricing trends across three major US retailers: Walmart, Macy's, Bloomingdale's, specifically looking at the **furniture** category, covering the period from 01/01/2025 to 05/08/2025.

# FURNITURE



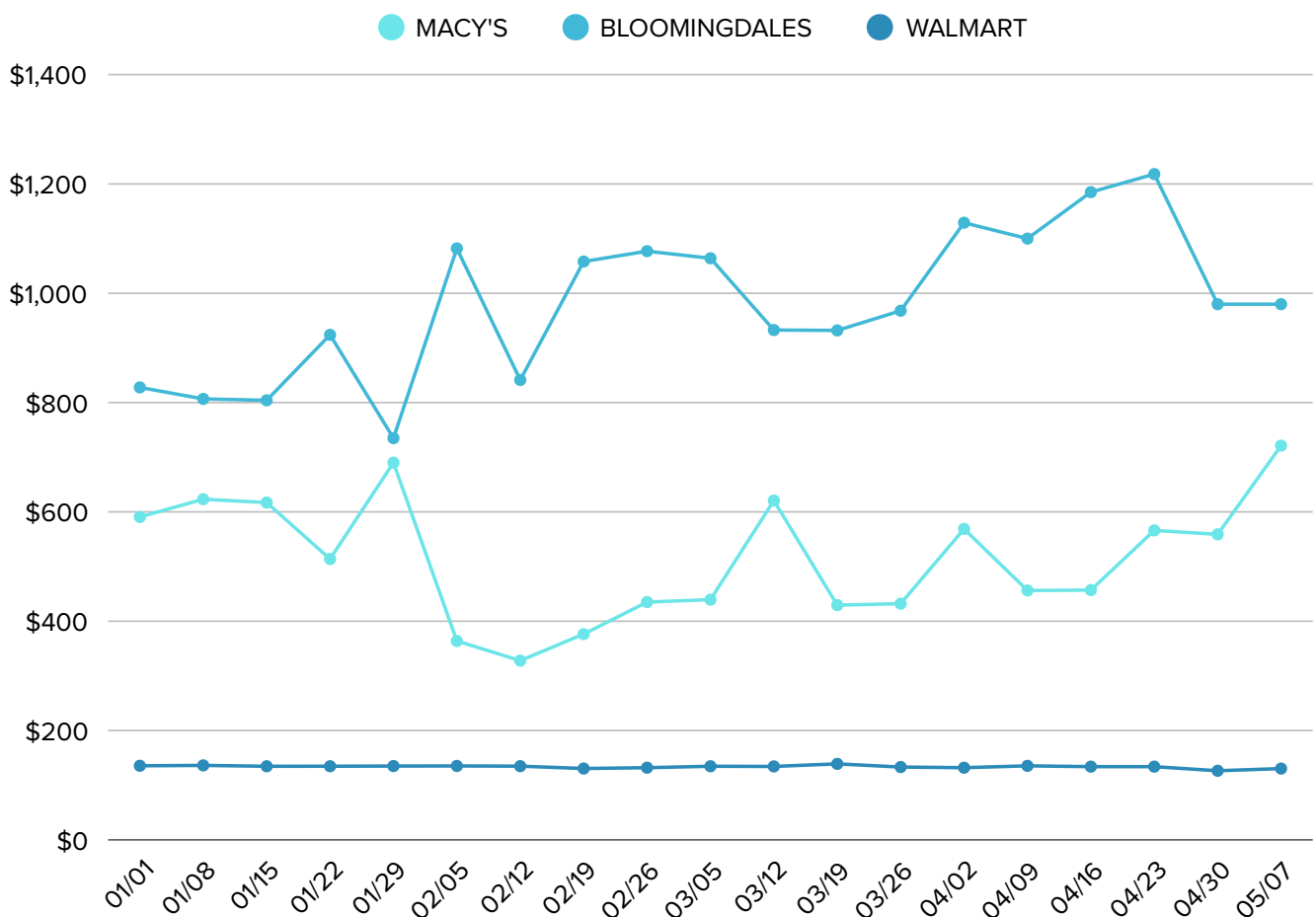
# Diverging Chair Prices Reveal Retailer Tariff Strategies

An analysis of average **chair** prices reveals differentiated pricing responses, suggesting that tariff impacts may be selectively passed through depending on retailer strategy and sourcing.

- **Macy's** experienced the sharpest price movements during the period. A drop in early February, potentially tied to end-of-season clearance or out-of-stock lower-end items, was followed by a nearly 89% rebound over the next 12 weeks, driving a net increase of **+22%**.
- **Bloomingdale's** saw a steadier increase of **+18%**, though a dip in the final two weeks may indicate stock constraints or a strategic pivot back to lower-priced offerings. The price pattern aligns with the introduction of newer SKUs rather than broad reactive pricing to tariffs.
- **Walmart**, in contrast, maintained pricing stability throughout the period, with an overall decrease. This consistency may point to a higher share of domestically sourced or pre-tariff-stocked inventory, enabling the retailer to absorb tariff costs or delay pass-through to consumers.

This divergence indicates that tariff pass-through is selective, depending on retailer strategy, sourcing profile, and inventory cycle.

AVERAGE PRICE BY RETAILER

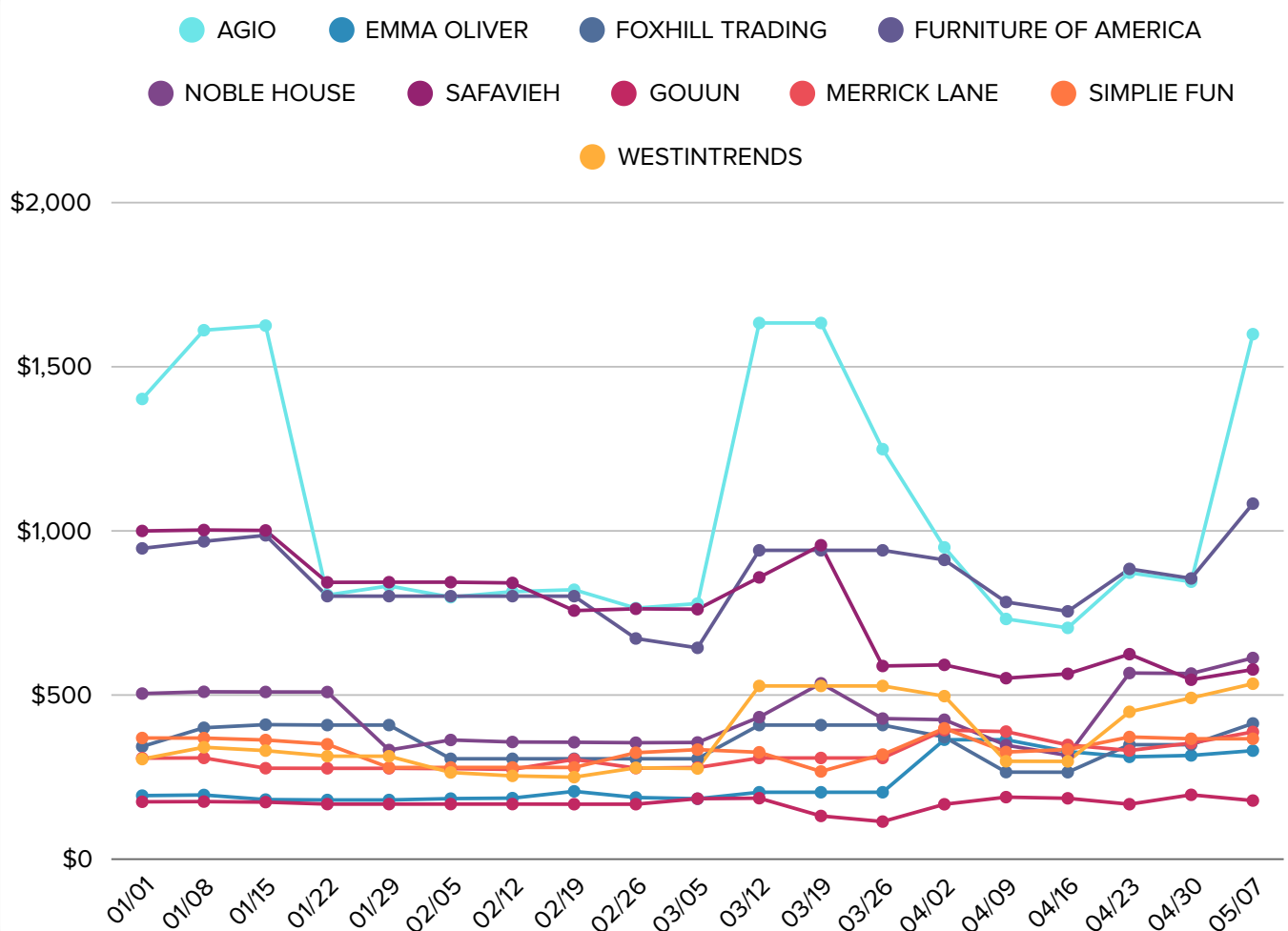


# Brand Tactics Drive Chair Price Volatility

While tariff-driven cost increases may have played a role, the data shows that brand-level price changes are inconsistent, abrupt, and highly variable, suggesting other factors, like promotional cycles, product mix, or internal pricing strategies, are likely at play.

- **Volatile Movers:** Brands like **Agio** and **Westintrends** exhibited some of the most dramatic price swings, but these were temporary rather than sustained. Agio's average price swung from over \$1,600 to under \$800, then rebounded to nearly \$1,600 again. This reflects promotional cycles or SKU rotation, not cost inflation.
- **Moderate and Stable:** Brands such as **Merrick Lane** or **Noble House** saw gradual increases, suggesting modest cost adjustment or margin targeting.
- **Price Decliners:** Brands like **Safavieh** (-42%) and **Simplie Fun** (-1%), showed a decline in average price, signaling either price-sensitive positioning or clearance efforts. Overall, pricing behavior was brand-specific and tactical.

AVERAGE PRICE BY BRAND

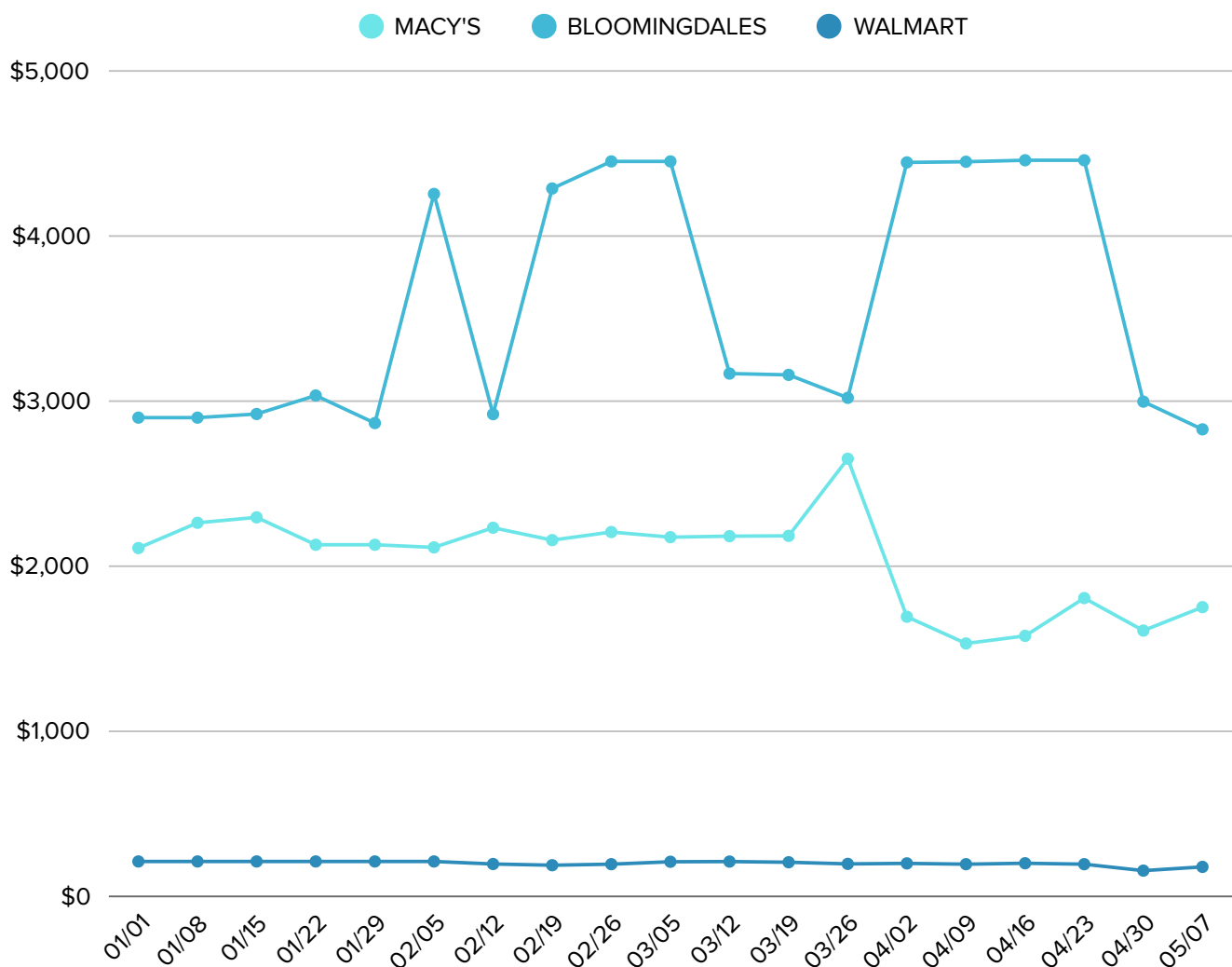


# Staggered Mattress Markdowns Point to Assortment Refresh, Not Tariff Pressure

This mattress category analysis reveals clear declines in average prices across all three retailers, yet the timing, scale, and volatility of these drops differ significantly, suggesting markdowns, inventory turnover, and SKU repositioning, not coordinated tariff response.

- **Macy's** held steady near \$2,100–\$2,200 through March before dropping sharply by over \$1,100 in April, resulting in a 17% decrease overall. This sudden decline points more to assortment rotation or markdowns than to gradual strategic price repositioning.
- **Bloomingdale's** showed the most volatility, swinging from \$2,900 to \$4,452 and back again in the first quarter. This may reflect temporary inclusion of high-end SKUs, not sustained price increases. Its net decrease of 3% masks the instability.
- **Walmart**, while maintaining the lowest price point, saw a gradual 16% decrease over the period. Its steady pattern likely reflects aging assortments or small-scale promotional adjustments, not major category shifts.

## AVERAGE PRICE BY RETAILER

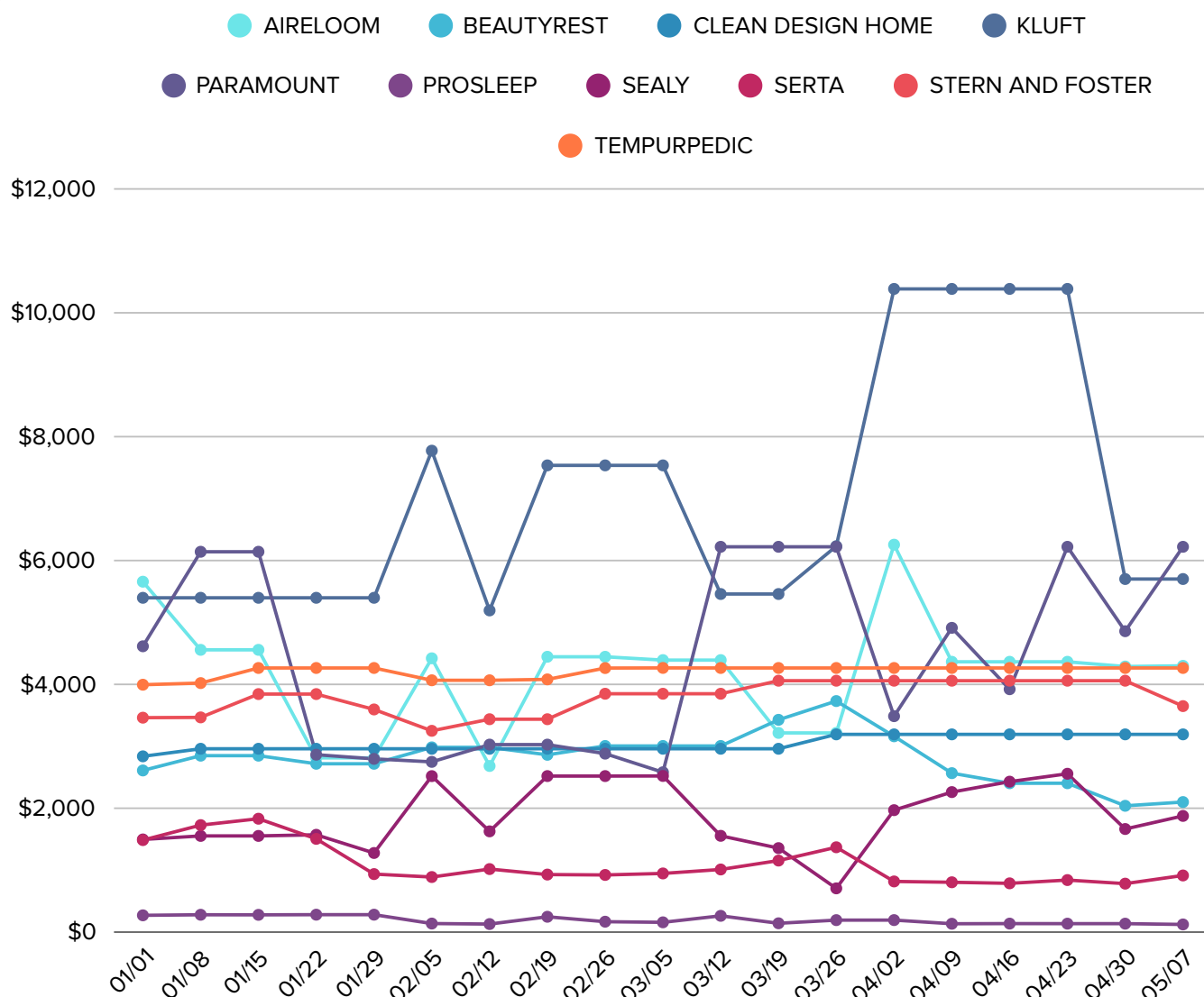


# Brand Price Turbulence Obscures Mattress Market Decline

While mattress prices overall declined during this period, the brand-level data tells a more complex story. Pricing trends vary significantly in direction and timing, suggesting promotions, assortment shifts, and SKU rotations played an influential role vs. a coordinated response to tariffs. The overall volatility and inconsistency weakens the case for clear cost pass-through.

- Price increases were recorded for 6 of the 10 brands, including **Paramount** (+35%) and **Stern & Foster** (+5%). However, these increases were often preceded by steep declines, such as Paramount's 58% drop from mid-January to early March before rebounding.
- Other brands saw steep price decreases, such as **Aireloom** and **Beautyrest**. These declines may reflect either deep discounting, end-of-life inventory, or efforts to stay competitive amid broader market deflation.

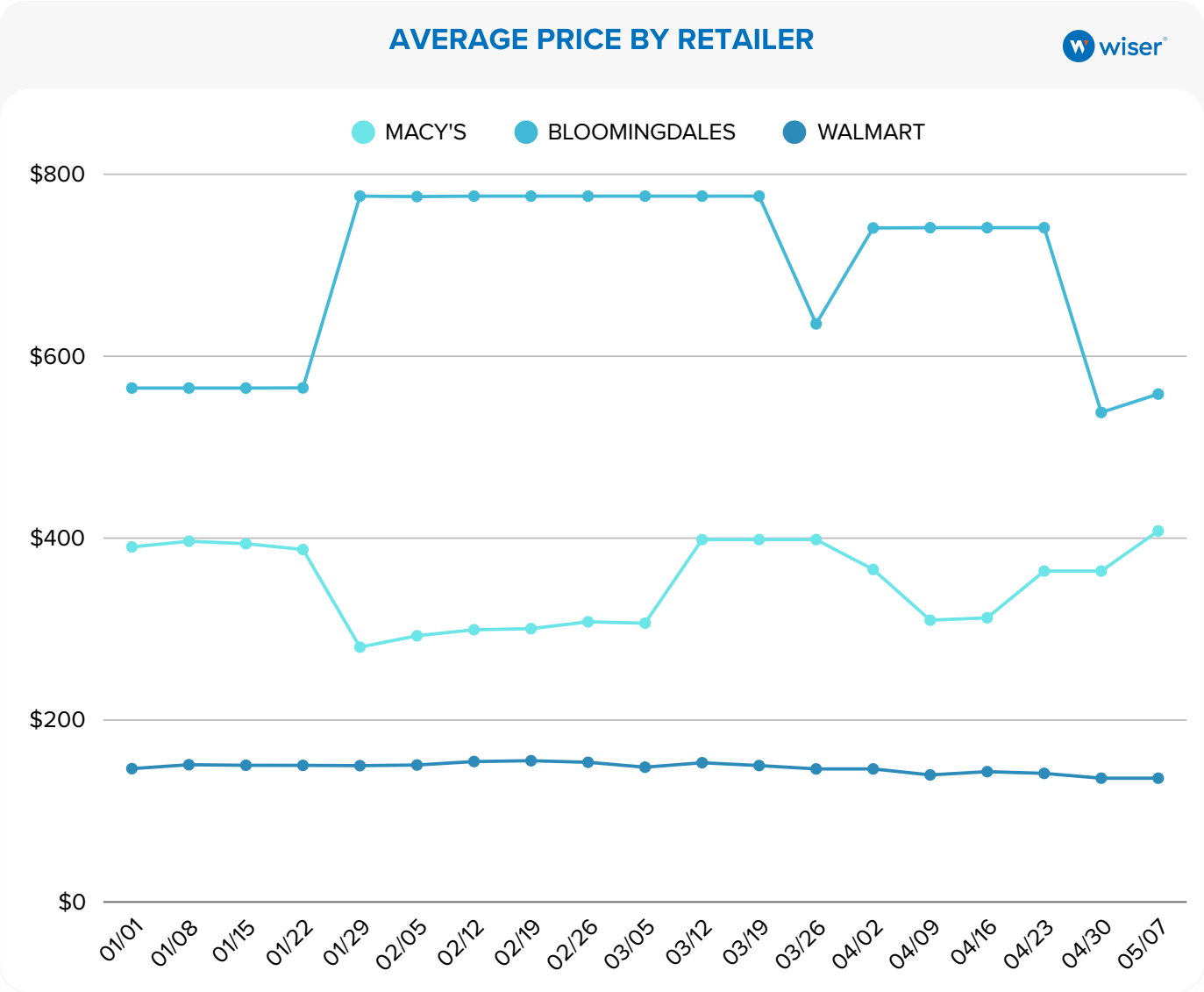
## AVERAGE PRICE BY BRAND



# Strategic Table Price Tweaks Signal Retailer Inventory Plays

All three retailers adjusted their pricing strategies over the period, with sharp shifts at Macy's and Bloomingdale's. These movements suggest that even in categories with smaller price swings, retailers are actively managing assortment and pricing, likely in response to cost pressures, stock availability, or shifting demand.

- **Macy's** recorded a net 5% increase, though this follows a sharp drop in late January and a sustained recovery to its highest price point by late March. This suggests a strategic return to higher-ticket SKUs, potentially in response to cost increases or inventory resets.
- **Bloomingdale's** shows a stepwise price pattern, with an initial price increase followed by two sharp reductions late in the period. Rather than a steady decline, this movement likely reflects inventory resets or SKU availability shifts, with the retailer adjusting its offering in bursts rather than gradually over time.
- **Walmart** recorded the largest overall decrease (-7%) but remained the most consistent across the period. With average prices moving within a narrow \$20 range, the trend likely reflects minor mix shifts rather than deliberate pricing moves.

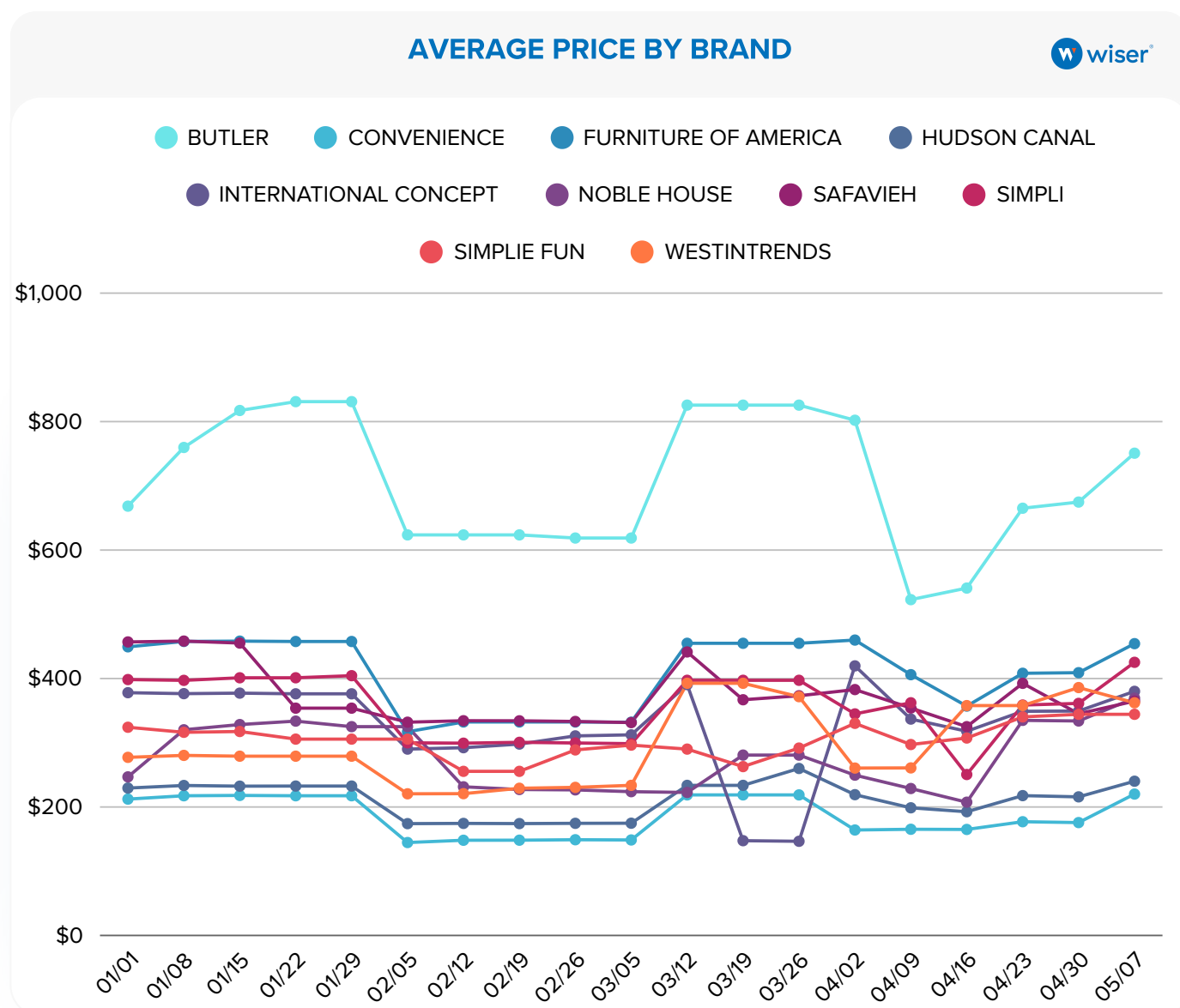




# Promotion-Driven Table Price Swings Signal SKU Shifts, Not Tariff Pass-Through

Brand-level pricing in the tables category reveals a noisy and inconsistent pattern, challenging the idea that rising prices are a direct response to tariff pressure. While many brands do end the period higher than they began, the path there is marked by discount cycles, sudden drops, and late-period rebounds, pointing to promotional activity and assortment shifts, not systematic cost pass-through.

- **Upward Movers:** Most brands do show a net increase in average price, but often through V-shaped trends. For example, **Butler** dropped 24% in February before rising back to end the period +12% above January.
- **Volatile Brands:** Brands like **International Concepts**, and **Hudson Canal** saw fluctuations, with multi-week declines followed by rebounds, suggesting inventory resets or pricing tests rather than steady upward pricing.
- **True Decliners:** While **Safavieh** dropped 20%, it's not the only brand showing an extended period of lower pricing. Several others dipped significantly before recovering, reinforcing the idea that temporary promotions or SKU transitions drove much of the volatility.



# Conclusion

Tariffs are clearly part of the pricing equation, but our data shows that their effects are being filtered, absorbed, or postponed, not immediately or uniformly passed on to consumers. Instead, we observed a strategic patchwork of pricing responses, shaped by assortment curation, margin control, and promotional behavior.

Price trends across brands and retailers were inconsistent, abrupt, and often contradictory. This suggests that tariff pressure, while real, is being addressed behind the scenes and that relying on average price trends alone fails to capture the full story.

The implications are significant: cost pressures may still be working their way through the system, setting the stage for delayed or compounded price increases in future quarters. Retailers who have prioritized consumer price protection may face trade-offs in margin, while those already raising prices risk competitive backlash if increases aren't well-timed or clearly communicated.

For brands and retailers navigating a volatile cost environment, this underscores the need for granular, SKU-level monitoring, contextualized by timing, assortment, and promotional cadence. It also raises the bar for pricing strategy: in a landscape where inflation isn't always visible, the winners will be those who can detect subtle shifts early and act with speed and precision.

**In short:** tariff-driven inflation may not be front and center yet, but the battle over how it's managed has already begun.



## 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.



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