

Tom Still: Manufacturers yearn for predictability in uncertain times

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MADISON, Wis. – American manufacturing has dealt with its share of ambiguity of late, from the shifting sands of tariffs to environmental rules altered after years of private investment, and from phasing in artificial intelligence to managing chronic worker shortages that AI even can't solve.

Now comes a Mideast war, an uptick in oil prices and an expectation that military needs for munitions and high-tech weaponry must be quickly fulfilled.

Meet Jay Timmons, the president and chief executive officer of the 14,000-member National Association of Manufacturers ... and a fan of Wisconsin's largest business sector.

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Timmons visited Milwaukee recently as part of a seven-city "State of Manufacturing" tour that began at Cleveland's Rock & Roll Hall of Fame and concluded in Phoenix, Ariz. I spoke with him following his visit to Rockwell Automation in Milwaukee.

Even during the 10 days that annual tour covered, the landscape changed for U.S. manufacturers coast-to-coast.

On the front end of the road show, the U.S. Supreme Court ruled, 6-3, against President Trump on his use of a specific law for levying taxes on imported goods and services. Timmons urged more predictability moving ahead.

“Manufacturers rely on stability to plan investments, grow operations and create jobs,” he said. “Ongoing legal and policy uncertainty makes it more difficult to make the long-term decisions that drive American competitiveness.”

Some U.S. companies have no problems with tariffs – with the steel industry being an example – while others don’t like them, such as heavy equipment manufacturers. I asked Timmons what NAM leaders think about them.

“We know that Donald Trump likes tariffs. Whether we like them or not is really irrelevant,” Timmons said, while noting they have a role in punishing “bad actors” in the trading world.

What’s relevant to manufacturers, Timmons added, is certainty in planning for capital investments, workforce decisions and more. Abrupt policy changes can be costly for much longer than a few months or a year. “You’re talking decades,” he said.

On the back end of Timmons’ trip, a shooting war broke out in Iran and throughout the Middle East.

“From serving as the ‘Arsenal of Democracy’ (during World War II) to equipping those who defend freedom today, our industry has the capacity to support U.S. objectives across multiple theaters and sustained operations,” Timmons said in a follow-up statement.

Perhaps he anticipated some observers would question if the United States had enough firepower to wage a long war – with reserves if the conflict grew longer and hotter. Those doubts have been raised but largely downplayed by defense and market analysts.

Other topics covered in our conversation:

- Wisconsin is one of the nation’s top three manufacturing states in per capita terms and well-represented on the association’s board of directors. Blake Moret, who leads Rockwell Automation, was named NAM’s chairman in January. Timmons said Wisconsin companies have an otherwise strong board presence. “I think that speaks highly of the power and might of manufacturing in Wisconsin,” he said.
- There are 433,000 unfilled jobs in U.S. manufacturing today and it’s not only

welders and electricians, but programmers who will be needed to help integrate technology into production. “AI is an additive to the workforce,” he said. “It allows human beings to be more productive and efficient. But we’ve got to make some policy changes in terms of permitting, energy supply and significant upgrades to the (electrical) grid.”

- So far, U.S. manufacturing has not accelerated its production of semiconductor chips, despite goals set by the Chips and Science Act of 2022. That’s an urgent need because about 90% of new chips today are manufactured in Taiwan. Again, producing more chips boils down to certainty in how policies are carried out.

“The state of (American) manufacturing will remain competitive ... and productive if policymakers will help provide stability,” Timmons said. “Manufacturers can adjust to many things, but uncertainty makes that harder.”

At a time when many Americans have daily jitters about which political “shoe” will fall next, predictability is something most people would welcome – whether they work in manufacturing or not.

Still is past president of the Wisconsin Technology Council and an advisor to Competitive Wisconsin Inc. tstill@insidewisconsin.net.