

# Quarterly Report

2<sup>nd</sup> Quarter / 2026

*Additional Comments of SCM Experts*

## European Supply Chain Risk Indicator (ESCRI)

Veit Kohnhauser, Logistikum, UAS Upper Austria

# 01 Transportation Disruption Risk

85.19

- Middle East tensions are disrupting transport planning and routing.
- Rising fuel prices are sharply increasing transport costs.
- Shipping routes are becoming less reliable and secure.
- Sea freight disruptions are causing delays and surcharges.
- Driver shortages continue to constrain road transport capacity.
- Infrastructure works are reducing rail network reliability.
- Rail transport costs are increasing due to capacity constraints.
- Transport disruptions are increasing delivery deviations and losses.
- Demand volatility is putting additional pressure on logistics networks.
- Greek import imbalances are tightening regional truck availability.
- Political tensions and strikes may further disrupt operations.
- Road and sea transport remain the most exposed.
- Geopolitical uncertainty is significantly raising disruption risk.
- Air freight is currently less affected by these risks.

# 02 Economic Risk

80.84

- Rising energy and input costs are increasing pressure.
- Demand remains vulnerable to sudden shocks and uncertainty.
- Wars and border closures are intensifying supply disruption risks.
- Longer lead times and higher costs weaken demand stability.
- Energy disruptions are increasing operational and financial uncertainty.
- Commodity volatility and border delays are raising exposure further.
- Oil and gas supply constraints are heightening energy security concerns.

# 03 Supplier Risk

79.63

- Supplier adjustments and make-or-buy shifts create transition risks.
- Mercosur may expand the available supplier base.
- Equivalent alternative suppliers remain difficult to identify.
- Second- and third-source networks are expanding further.
- Supplier stability depends on fuel price and availability.
- Insolvencies and material shortages are increasing supply risk.
- Allocation risks remain critical in strategic raw materials.
- Energy and electronics sourcing markets remain highly volatile.
- Shortages are raising electronics procurement uncertainty.
- EU pressure may accelerate shifts away from China.
- Price volatility and schedule inconsistency are worsening reliability.
- The Strait of Hormuz is increasing supply uncertainty.
- Supplier financial and regulatory risks are rising further.
- Global polymer market shifts are weakening European suppliers.
- Middle East conflict is driving raw material volatility.
- Iran-related tensions are disrupting supplier stability and lead times.
- Geopolitical developments are materially increasing supplier exposure.

# 04 Government Intervention Risk

79.17

- New conflicts could further raise political and trade uncertainty.
- Geopolitical developments remain a major source of risk.
- EUDR and the Supply Chain Act add pressure.
- Political instability continues to weaken supply chain stability.
- Government interventions remain relevant but unevenly critical.
- Possible energy restrictions could disrupt supply and operations.
- Rising EU compliance demands increase costs and resource use.
- The risk level is already high with limited upside.
- The new customs platform may increase procedural complexity.
- Crude oil dependency increases exposure to political disruptions.
- Geopolitical disorder continues to intensify the risk environment.

# 05

## Customer and Demand Risk

72.22

- Customers expect fast delivery but remain cautious buyers.
- Geopolitical cost pressure may lead to customer losses.
- Some customers are becoming slightly less demanding.
- Chinese manufacturers are intensifying competitive pressure in Europe.
- Demand patterns are shifting quickly and unpredictably.
- Short-term ordering reduces visibility and weakens loyalty.
- Uncertain business conditions continue to suppress planning stability.
- Call-off volatility and project delays are increasing uncertainty.
- Critical infrastructure markets remain comparatively resilient in crises.
- AI is reducing demand for external software providers.
- Geopolitical tensions are making service requirements harder to meet.
- Customer demographics are changing and reshaping demand patterns.
- Many customers now prefer good-enough, lower-cost solutions.
- High substitutability increases switching risk under price volatility.
- Aggressive price competition is eroding historic customer loyalty.
- Cost-focused purchasing behaviour is reducing long-term loyalty

# 06

## Cybersecurity and Data Risk

70.83

- Interface vulnerabilities with partners remain a cyber risk.
- Cyberattacks are continuing to increase in frequency.
- Threats are becoming more complex and harder to manage.
- Cyber risk is rising, but less sharply.
- Logistics providers remain attractive targets for hackers.
- Data corruption remains a significant operational concern.
- Other risks are currently drawing more management attention.
- Cyber and data risks remain consistently hard to control.
- Email-based attacks are becoming more frequent.
- Cybersecurity investments are strengthening confidence in protection

# 07

## Technological or Competitive Risk

64.81

- Choosing the right technology path is becoming harder.
- Initial AI applications are now moving into implementation.
- AI is lowering barriers to market entry.
- Clear regulation supports technology-driven competitive improvement.
- Geopolitical tensions are shifting competition toward the Near East.
- Proprietary technology strengthens differentiation and strategic control.

# 08

## Operational Risk

62.96

- Labour shortages are reducing operational flexibility and resilience.
- Geopolitical tensions are destabilising secondary markets and planning.
- Middle East conflict is pushing petrol and energy costs higher.
- Aging machinery is increasing breakdowns and execution risk.
- Climate volatility and natural hazards remain hard to predict.
- Theft incidents are increasing security needs and disruption exposure.
- Helium, semiconductor issues are disrupting supply.
- Trieste corridor bottlenecks are delaying intermodal and rail flows.
- Fuel shortages are triggering speculative demand and delivery stress.
- Hormuz-related uncertainty is reducing visibility for production planning.
- Tariff volatility is amplifying the bullwhip effect.
- Unpredictable geopolitical costs are undermining operational stability.

# 09

## Environmental Risk

57.94

- Environmental risk remained comparatively stable in Q2 2026.
- No major new environmental risk drivers emerged.
- Weather related disruptions remain relevant but largely manageable.
- Preparedness measures improved resilience against weather disruptions.
- Environmental risk showed the lowest increase of all.
- Extreme weather continues to threaten supply chain stability.
- Climate-related disasters remain a persistent environmental risk

# 10

## Quality Risk

57.87

- Complex handling steps and staffing gaps raise quality risk.
- Changing standards and regulations increase quality complexity.
- Transport disruptions increase delivery deviations and loss risks.
- Higher Asian export volumes raise coordination requirements.
- Stable supplier structures help keep quality risk contained.
- Customer requirements continue to shape quality expectations.
- Modal shifts are extending transit times and complexity.
- Resource shortages are limiting quality assurance capacity.
- Resolved issues and stronger awareness support greater stability.
- The Iran war adds uncertainty to quality processes.
- Strong quality commitment helps maintain stable performance.

## **Imprint**

### **Publisher**

Prof. (FH) DI Dr. Veit Kohnhauser  
University of Applied Sciences Upper Austria  
LOGISTIKUM – Faculty of Logistics  
Wehrgraben 1–3  
4400 Steyr  
Austria

Website: <https://fh-ooe.at>

Report Download: <https://www.vnl.at/leistungen/european-supply-chain-risk-indicator>

### **Contact**

For further information or participation in the survey:

[veit.kohnhauser@fh-steyr.at](mailto:veit.kohnhauser@fh-steyr.at)