Quarterly Report

3rd Quarter / 2026

Additional Comments of SCM Experts

European Supply Chain Risk Indicator (ESCRI)

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01 Economic Risk

82.43

- Energy and labour costs remain persistent, dominant cost pressures
- Skilled labour shortages continue challenging operational capacity
- Rising commodity prices and global energy shortages persist
- Border delays continue disrupting cross-border supply flows
- Israel conflict escalation heightens geopolitical risk exposure
- Rising fuel costs add to raw material volatility
- Society and organisations adapt slower than disruptions evolve
- Rising freight surcharges reflect structural transport cost inflation
- Extended delivery times cause recurring goods shortages
- Internal restructuring reflects active repricing of risk
- Wars, energy and commodity prices remain key drivers

02 Supplier Risk

77.03

- Delivery inconsistencies reflect supplier exposure to geopolitical shocks
- Persistent price volatility keeps supply chain tensions elevated
- Falling credit ratings signal weakening supplier financial stability
- AI-driven demand strains electronic memory component sourcing
- Manufacturer RAM transition finds Europe's industry unprepared
- Collaborative logistics and strict control maintain supplier reliability
- Geopolitics, sustainability rules and unfair competition raise risk
- Middle East uncertainty increasingly unsettles supplier confidence
- Unrest, CBAM, transport and wage costs drive price increases
- High energy dependence continues underpinning cost volatility

03 Transportation Disruption Risk

75.68

- Driver shortages and fuel volatility increase transport risk
- New EU rules tighten non-EU driver availability
- Container and transshipment availability remains limited
- Spanish infrastructure underinvestment compounds geopolitical pressure
- Road-focused European transport sees comparatively limited disruption
- Middle East tensions expected to ease, effects linger
- Global VUCA conditions challenge supply chain planning
- Rising diesel costs add to demand volatility
- Rail maintenance causes recurring train cancellations
- Construction works and container shortages strain key corridors
- Iran conflict risks fuel shortages, unprofitable lanes
- Seasonal demand peaks and holidays add pressure
- Structural risks extend beyond the short term

04 Cybersecurity and Data Risk

73.65

- Increased AI integration opens new cyberattack access points
- Advancing digitalisation raises logistics sector's cyberattack exposure
- Absence of coordinated projects leaves companies solving alone
- Platform failures repeatedly disrupt communication despite security controls
- Growing attack diversity increases complexity to manage
- Slower software implementation speed reduces organisational responsiveness
- AI massively lowers entry barriers for cybercriminals
- Some respondents see overall cybersecurity resilience improving

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05 Customer and Demand Risk

70.95

- Customer demand continues shifting rapidly and unpredictably
- Market reputation increasingly shapes customer purchasing decisions
- B2B environment provides comparatively more structured demand patterns
- Demand behaviour remains difficult to evaluate reliably
- Uncertainty affects both customer intentions and underlying desires
- Demonstrations and blockades complicate forecasting, deliveries stay reliable
- Customers demand more without compensating cost or margin pressure
- Rising insolvencies and price sensitivity reduce sales volumes
- Unstable supply chains push shorter delivery times, deviations
- Growing customer maturity supports more predictable relationships

06 Government Intervention Risk

69.59

- Growing, increasingly uncertain regulations affect all business areas
- New Indian import rules and digital product passport introduced
- Geopolitics expected to ease slightly, but remains fragile
- New tariff regulations bring hope despite customs documentation burden
- Short-lived governments limit sustainable, well-implemented regulatory reforms
- Current adjustments stabilise while new trade agreements offer opportunities
- New German emission limits target chipboard products
- EU regulations often arrive before national implementation is ready
- Multiple unresolved national-level regulatory issues persist

07 Technological or Competitive Risk

68.92

- AI progress and development continue advancing exponentially
- Greater AI use in engineering reduces customer dependency
- Technological development itself now drives market volatility
- Technology remains indispensable for logistics industry competitiveness
- Global VUCA conditions increasingly shape competitive dynamics
- Market unrest intensifies competitive activity among players
- New market entrants expected to increase competitive pressure
- Significant changes in Spanish law affect market conditions

08 Environmental Risk

63.51

- Global warming remains an established, ongoing reality
- No direct disruption experienced from disaster events yet
- Rapidly shifting policies and focus amplify disruption potential

09 Quality Risk 59.46

- Increasing regulation adds complexity to quality risk
- Weak quality culture and training challenges persist
- Prior quarter's complaint expected to lower assessment
- Three years incident-free through strict communication control
- Rising demands across all areas without additional cost
- Lean structures can create unintended quality impacts
- Suppliers may cut corners to protect profitability
- Well-established companies maintain stronger quality discipline

10 Operational Risk *58.78*

- Israel-US conflict keeps fuel prices, offshore chains unstable
- Regional conflicts and summer heatwaves trigger energy fluctuations
- Resource scarcity continues constraining operational capacity
- Unresolved ERP transition risks potentially serious consequences
- Unclear global politics delay or halt project investments
- Daily industrial safety programs support equipment operation discipline
- Market ambiguity strains planning, procurement and cost efficiency
- Delayed investments in favour of maintaining existing systems
- Postponed upgrades gradually increase system downtime
- Risk levels seen as near their practical ceiling

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