

Quarterly Report

4th Quarter / 2026

Additional Comments of SCM Experts

European Supply Chain Risk Indicator (ESCRI)

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01 Transportation Disruption Risk

85.24

- Rising fuel prices remain a persistent threat to transport.
- Fuel costs and driver shortages constrain road and multimodal capacity.
- Conflict-related blockades and risk premiums raise maritime shipping costs.
- Diesel floaters cause additional, unbudgeted transport costs.
- Energy prices directly increase raw material and export transport costs.
- Climate impacts, amplified by port strikes, still disrupt transport.
- Renewed port strikes and Chinese New Year threaten container availability.
- Decarbonisation targets, carbon pricing, fleet conversion and strikes strain transport.
- Overloaded EMEA networks and unreliable Deutsche Bahn hamper flows.
- Transport providers must maintain their service standards.
- Weak economy frees capacity, but high fuel prices offset this.
- Possible border blockades in Bosnia add uncertainty.
- Persistently high risk and long lead times from Asia.
- Intercontinental flows, including Africa–Europe, are particularly affected.
- Price pressure may trigger conflicts that disrupt traffic flows.
- No visible transport risks apart from war or pandemics.
- Rising energy costs could destabilise transport demand.

02

Economic Risk

84.13

- Shortage of skilled workers compounds rising energy costs.
- Rising energy costs and Chinese finished-goods imports increase pressure.
- Energy costs, driver shortages and volatile demand impair planning.
- Labour costs are uncompetitive by global comparison.
- Commodity price volatility and rising energy costs persist.
- Energy costs, staff reductions and uncertainty heighten economic risk.
- Volatility is already at a very high level.
- Conditions already negative; further deterioration is not expected.
- Previously cited pressures continue to drive economic risk.
- Energy cost increases are certain, with no reversal in sight.

03

Supplier Risk

77.62

- EU bureaucracy weakens SME competitiveness, risking liquidity shortfalls.
- Economic disruption and EU regulation drive closures, mergers and concentration.
- Far East suppliers withdraw from EU bureaucracy, raising prices.
- Supplier problems are steadily increasing across the board.
- Economic strain drives insolvencies among carriers and component suppliers.
- Regulatory overhead burdens suppliers already under cost pressure.
- Rising costs can only be passed on partially or late.
- Geopolitical shocks increase uncertainty, prices and currency risk.
- Electronic components face longer lead times and rising chip prices.
- Supplier quality issues and relocations require building new experience.
- Rising material prices and Balkan border congestion strain supply.
- Long supply chains face pressure from rising energy costs.
- Rail freight depends entirely on a single infrastructure manager.
- Risk remains high but is not expected to rise further.

04

Cybersecurity and Data Risk

77.62

- Attacks are steadily rising and increasingly sophisticated.
- Growing attack attempts require stronger security measures.
- AI-supported systems and IT dependence increase cyber exposure.
- Cyber incidents destabilise systems, e.g. failing charging stations.
- Multi-stage social engineering shows how quickly attacks succeed.
- Stronger security systems and staff training reduce risk.
- Threats and countermeasures are increasing in parallel.
- Cyber risk seems set to only increase.
- Risk remains unchanged at a high level.

05

Government Intervention Risk

73.81

- EU packaging regulation adds new compliance requirements.
- Tariffs, especially US tariffs, never benefit globally operating companies.
- Unpredictable Russia sanctions may threaten winter gas supply.
- Regulatory responses may force companies to change their plans.
- Austrian market already heavily regulated; no further interventions visible.

06

Customer and Demand Risk

71.90

- Missed delivery times or delivery difficulties lead to lost business.
- Customer behaviour is hard to predict as loyalty declines.
- Fluctuating customer call-offs will reduce delivery performance.
- Economic conditions and global competition intensify customer pressure.
- Customers exit and new ones enter, notably in automotive.
- E-commerce and marketplaces reshape customer demand.
- Consumption pressure is expected to change purchasing patterns.
- Payment defaults remain a growing risk in the EU.
- Rail infrastructure constraints penalise customers and favour other modes.
- Retention measures keep customer risk high but stable.

07

Technological or Competitive Risk

66.19

- Rail tariff model undermines competitiveness and sustainability.
- Competitors cut prices sharply to survive displacement competition.
- State-backed Chinese competitors are pushing into the European market.
- Uneven AI adoption may give competitors a service advantage.
- AI drives massive technological and workforce shifts.
- Fast-paced AI puts AI at the centre of transformation.
- AI makes new capabilities more easily accessible.
- Competitors are establishing new production sites nearby.
- Risk remains extremely high and is expected to persist.

08

Operational Risk

64.76

- Raw material costs, route disruptions and fuel prices increase risk.
- Geopolitical developments bring mostly negative surprises.
- Internal footprint relocations create operational challenges.
- New EU tachograph rules reduce special transport capacity in Europe.
- German rail renovation shifts transport volumes from rail to road.
- Electronics shortages, especially memory and PCBs, and energy costs persist.
- Repairs are postponed and wage dissatisfaction is growing.
- Schengen 90/180-day rule raises the risk of strikes.
- Winter increases exposure to extreme weather events.
- Strikes, thefts and road collapses are expected to increase.
- Mitigation planning must continuously anticipate new risk layers.
- Adequate maintenance keeps operational risks under control.
- Operational situation currently stable and under control.

09

Environmental Risk

63.94

- Growing climate challenges and extreme weather increase supply chain risk.
- Local weather events have massive effects on global supply chains.
- Typhoons in Southeast Asia paralyse ports and interrupt goods flows.
- Black ice, heatwaves and floods disrupt tightly scheduled supply.
- Winter raises the risk of extreme weather events.
- Exposure to extreme weather like in Q1 remains high.
- Natural disasters, water scarcity and food access difficulties increase.
- UN calls for tripling decarbonisation measures.

10

Quality Risk

57.62

- Incomplete onboarding of new employees keeps quality risk present.
- Continuous reviews improve product and service quality.
- EU Machinery Regulation and Cyber Resilience Act raise user requirements.
- Customers use complaints to generate additional revenue.
- New PFAS standard adds quality compliance requirements.
- Objective and subjective quality criteria evolve continuously.
- Quality currently high, with no change in sight.

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