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International Survey 2022 Supply Chain Bottleneck

HOW SUPPLY PROBLEMS AND SHORTAGES THREATEN BUSINESS DEVELOPMENT



The Global
Interim Management Group

INTERNATIONAL SURVEY 2022

SUPPLY CHAIN BOTTLENECK



The Global
Interim Management Group

Dear readers,

in cooperation with the globalise partner network, we have surveyed exactly 600 top global executives – including managing directors, board members, supervisory board members and interim managers from a wide range of industries and countries – in the period from June to July 2022.

The survey concludes that the ongoing bottlenecks in supply chains are having an increasingly negative impact on global industry. Above all, the automotive sector, the energy sector and steel and metal manufacturers are suffering from the consequences of the acute supply problems, which market experts believe have long had an inhibiting influence on the development of globally operating companies. In particular, China's strict zero-covid strategy and the Russia-Ukraine war are affecting the companies' business.

What needs to be done facing this situation?



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The survey parameters

- + **Period of the survey:** June and July 2022
- + **Method:** Online-Survey using questionnaires with closed and open questions
- + **600 top executives participated**



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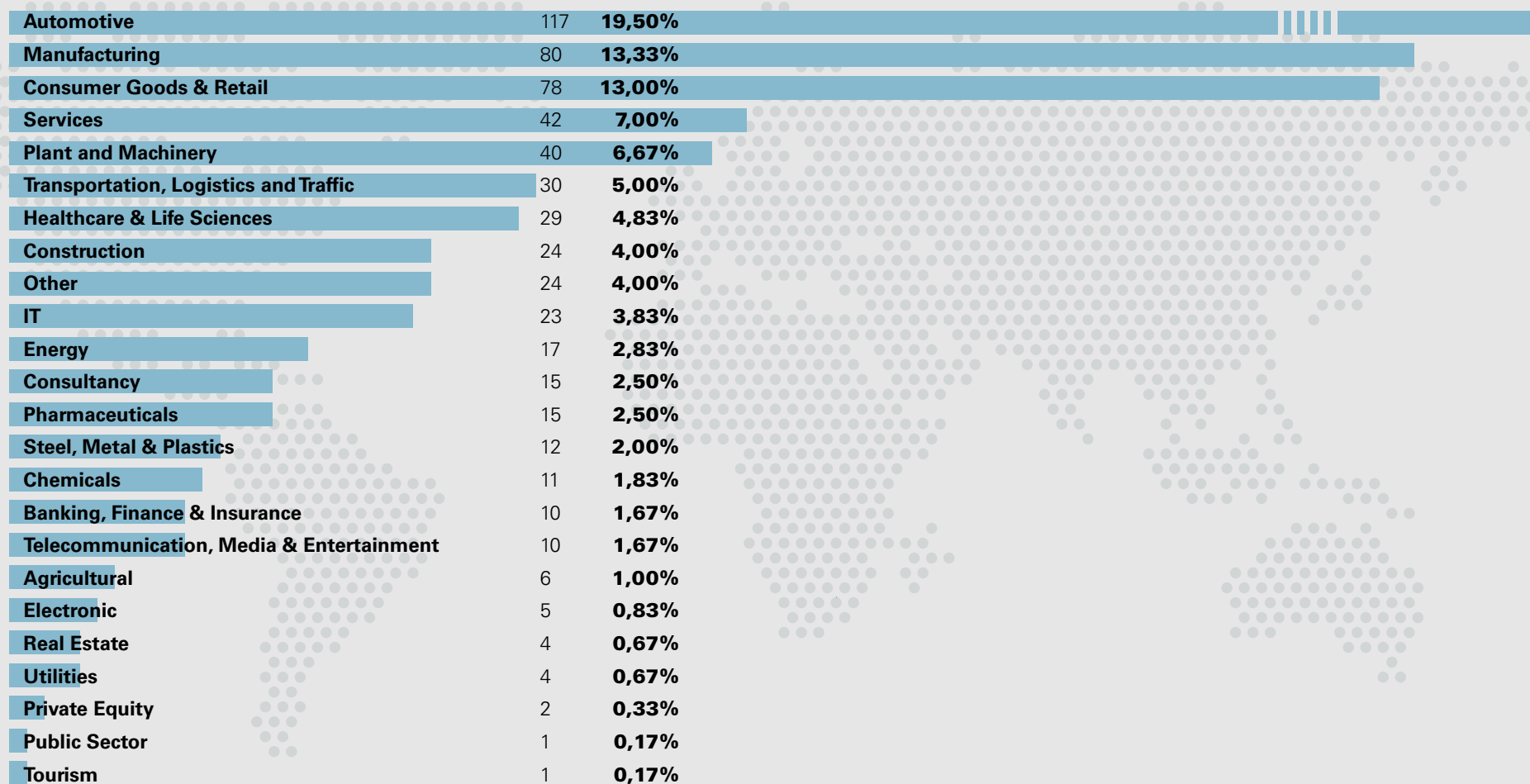


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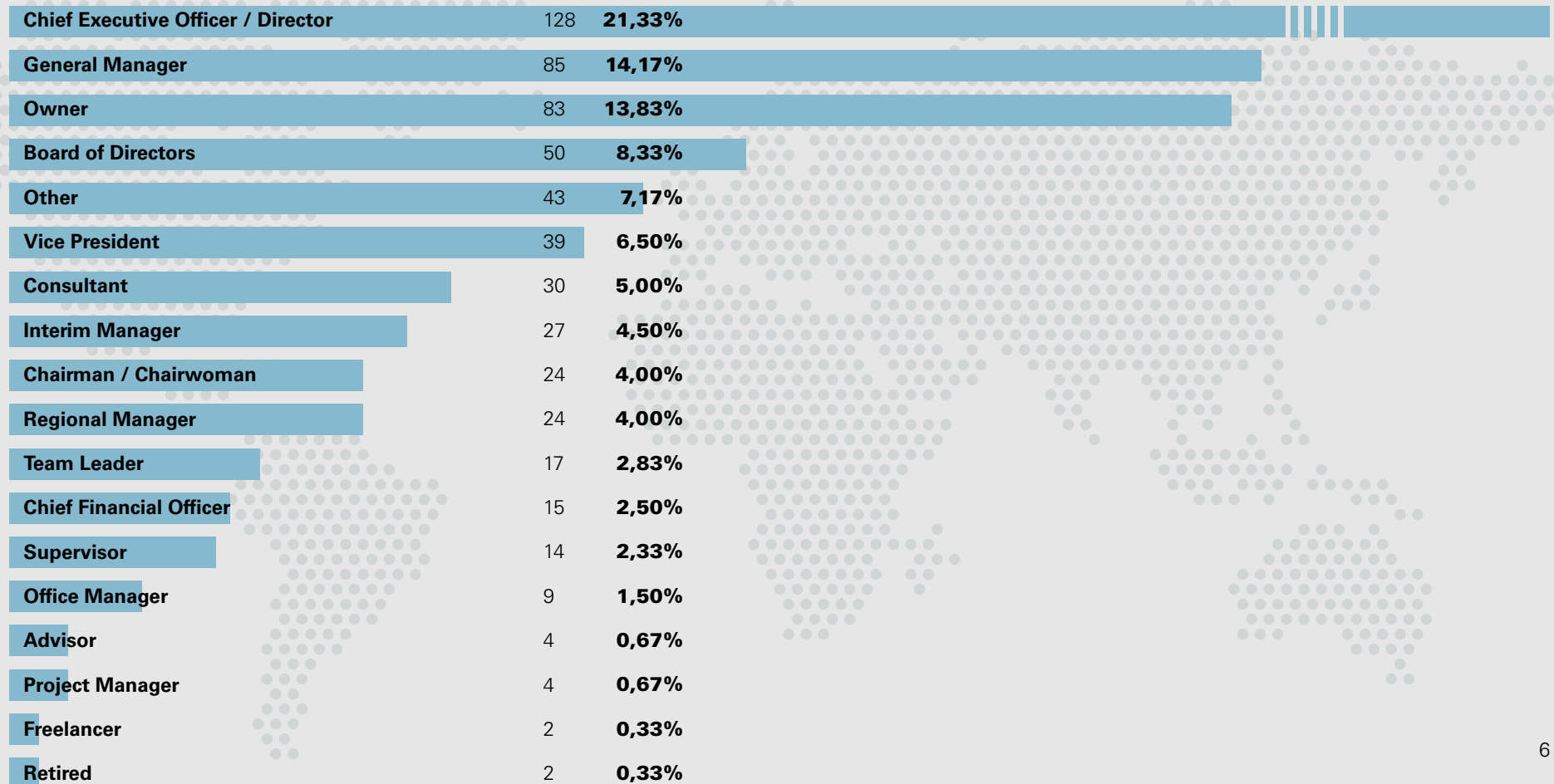
In which **country** do you reside?



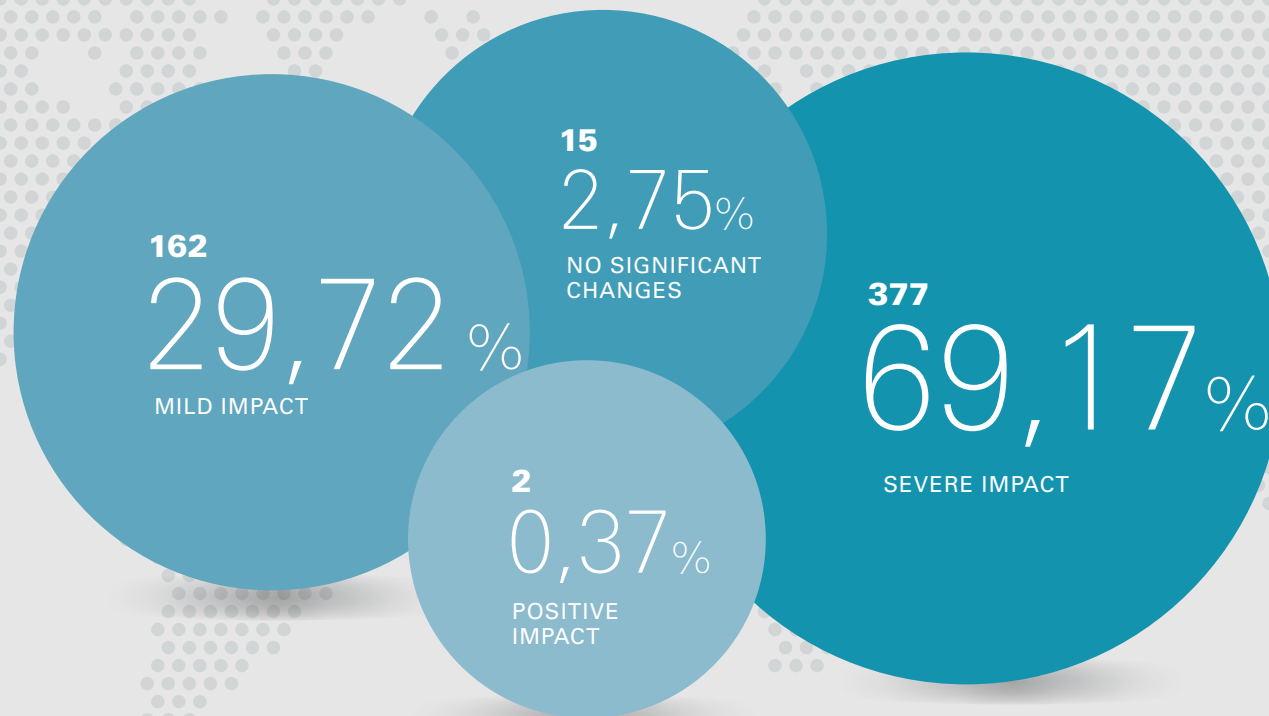
What is the **focus industry** of your company/companies?



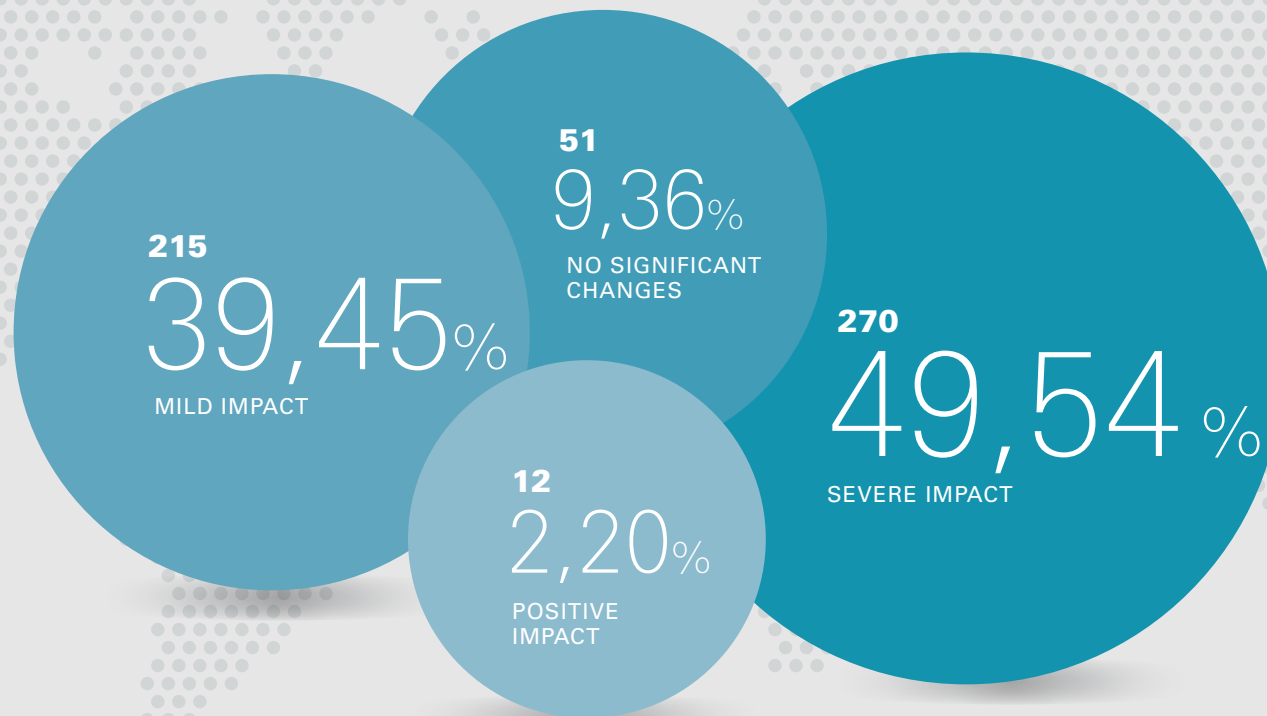
What is your **main role** in the company/companies?



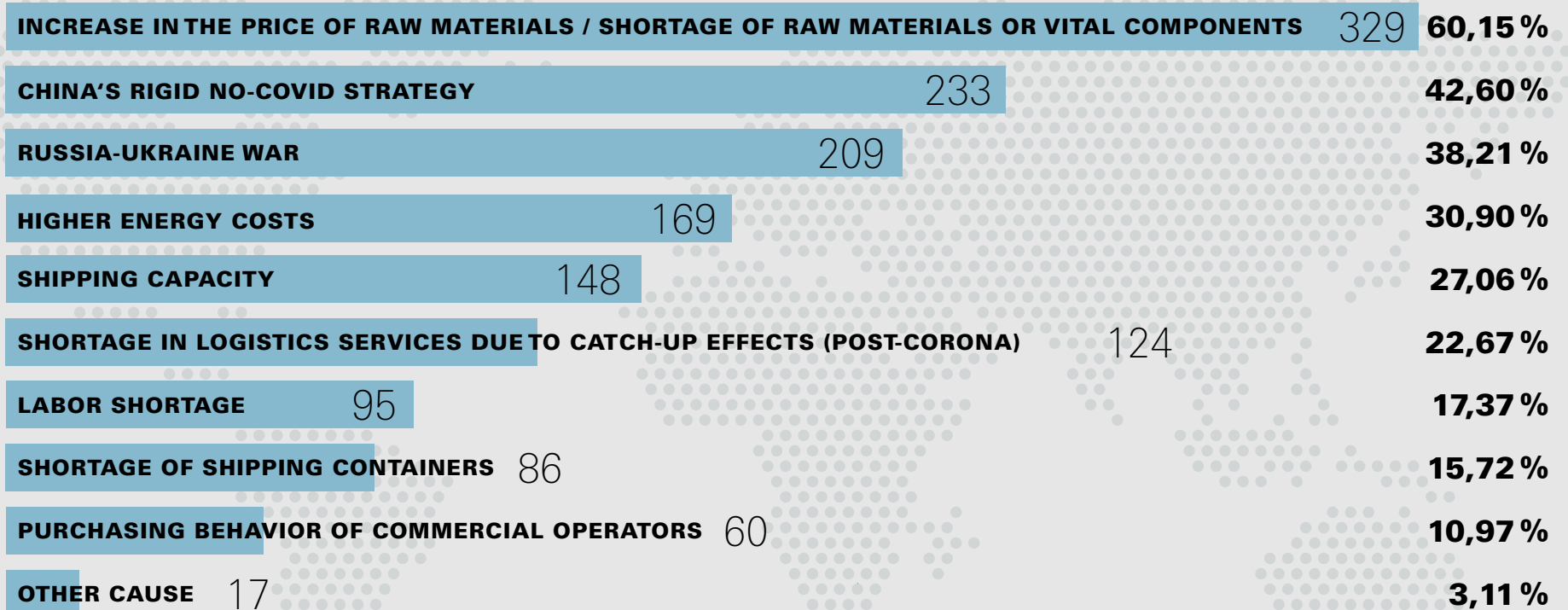
How do you assess the economic impact of supply chain bottlenecks
in your country?



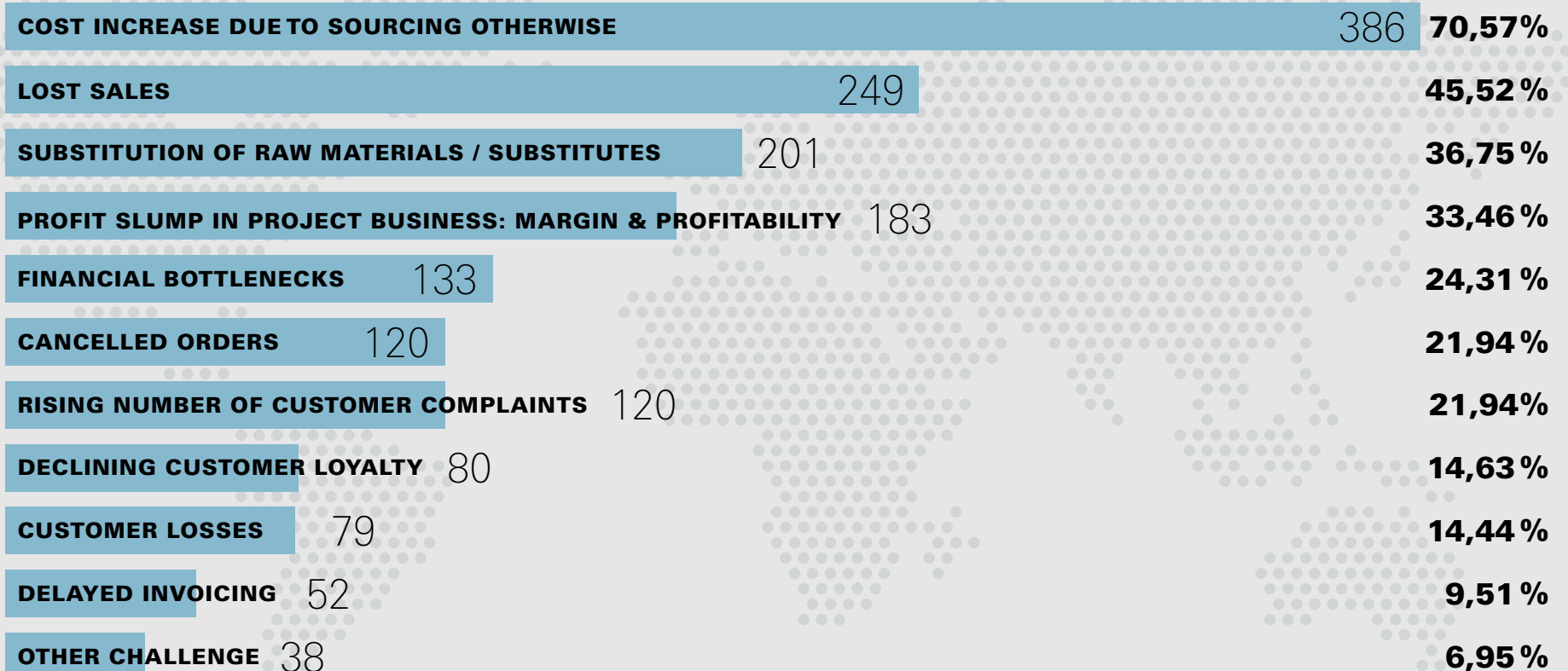
What is the impact of supply chain bottlenecks on
your company / companies?



What are the main causes of supply chain bottlenecks **in your industry?**



In your opinion, what are the **3 biggest challenges** for companies due to supply bottlenecks?



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How strong do you think **each industry** in your country **is affected** by supply chain bottlenecks? (Please rate at least 15 industries)

Agricultural	12	2,64%	48	10,57%	125	23,96%	171	33,31%	89	18,65%	58	10,88%
Automotive	1	0,14%	7	1,35%	17	3,29%	136	27,25%	346	66,64%	7	1,35%
Banking, Finance & Insurance	72	14,58%	117	23,89%	182	35,97%	77	14,90%	5	0,89%	58	9,79%
Chemicals	3	0,80%	15	3,78%	74	13,85%	215	42,08%	167	31,09%	39	8,43%
Construction	7	1,36%	16	3,78%	60	11,06%	215	41,92%	185	37,17%	27	4,72%
Consumer Goods & Retail	2	0,28%	18	3,86%	138	26,21%	227	44,41%	99	21,13%	24	4,13%
Energy	8	1,33%	14	2,36%	44	9,15%	109	22,22%	302	60,18%	27	4,78%
Healthcare & Life Sciences	16	3,21%	81	16,76%	180	35,07%	141	28,06%	33	6,75%	56	10,16%
IT	38	7,75%	90	18,08%	161	32,85%	113	22,91%	59	11,91%	36	6,52%
Manufacturing	0	0,00%	14	2,70%	49	10,38%	226	42,48%	210	41,94%	14	2,51%
Pharmaceuticals	15	2,70%	53	12,35%	121	25,45%	192	37,03%	60	11,39%	62	11,09%
Private Equity	72	15,93%	115	24,43%	132	25,92%	66	13,15%	17	3,22%	94	17,38%
Public Sector	59	13,04%	120	25,40%	156	30,22%	77	16,04%	16	3,10%	64	12,20%
Plant and Machinery	0	0,00%	11	2,13%	63	12,35%	255	50,58%	150	29,22%	27	5,74%
Steel, Metal & Plastics	1	0,34%	4	0,96%	38	7,29%	182	35,54%	259	51,47%	23	4,40%
Telecommunication, Media & Entertainment	46	9,22%	104	20,52%	163	33,32%	109	21,62%	40	7,01%	41	8,32%
Services	37	7,25%	117	25,61%	179	35,00%	86	17,60%	34	6,22%	46	8,32%
Transportation, Logistics and Traffic	6	1,02%	23	4,69%	36	7,61%	137	24,83%	286	56,71%	25	5,15%
Utilities	8	1,78%	46	9,78%	100	18,90%	155	33,04%	93	20,31%	83	16,21%
Tourism	34	5,80%	86	18,91%	165	33,25%	107	20,88%	62	11,94%	47	9,22%

NO AFFECTON

VERY WEAK

WEAK

STRONG

VERY STRONG

I DO NOT KNOW

RANKING:
FROM NO AFFECTON (1)
TO VERY STRONG (5)

1

2

3

4

5

NO
AFFECTON

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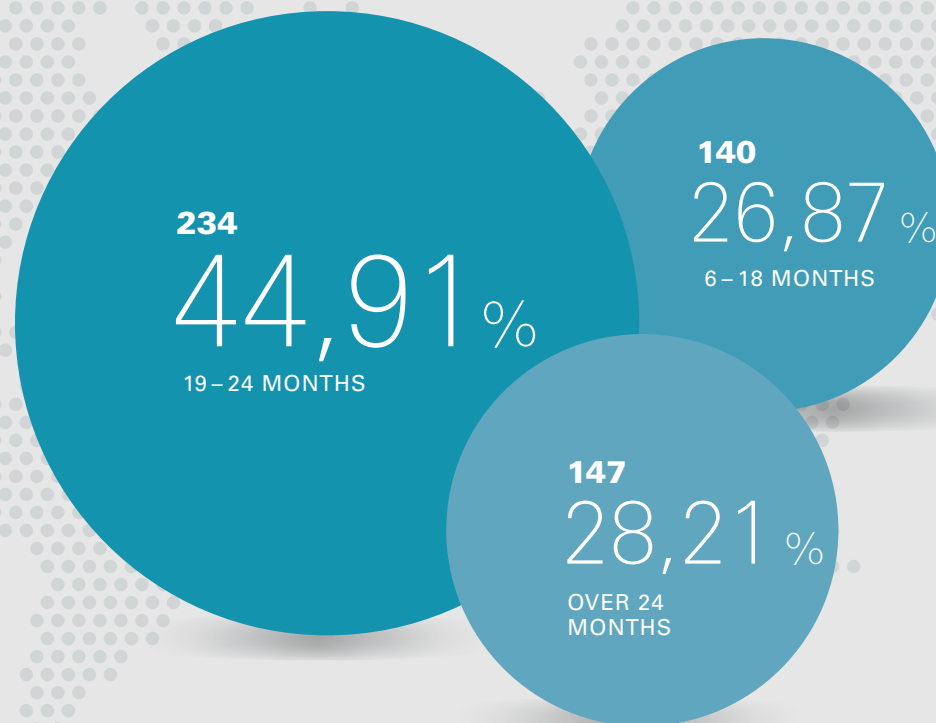
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VERY
STRONG

In your opinion, what are the **5 TOP measures to address** the supply chain bottleneck in your industry?

Develop new suppliers locally	290	55,88%
Diversify suppliers	255	49,13%
Increase prices	213	41,04%
Increase level of inventory	194	37,38%
Substitute raw materials	147	28,32%
Increase lead time to customers	127	24,47%
Establish near-shore production facilities	123	23,70%
Interfunctional planning (supply chain, purchasing, marketing, sales)	107	20,62%
Improve leadership and supply chain competence	107	20,62%
Push technical development	99	19,08%
Build up storage capacity	92	17,73%
Workflow optimization	91	17,53%
Process innovation (procurement planning)	87	16,76%
Reduce specs to allow more flexibility in purchasing	80	15,41%
Enhance customer relationship management	71	13,68%
Partnership with servicers / logistics operators for stocks and delivery optimization	62	11,95%
Financial planning	62	11,95%
Sustainability	61	11,75%
Reduce number of SKUs (Stock Keeping Units)	48	9,25%
Form purchasing / procurement pools	40	7,71%
Use verticalization strategies	39	7,51%
Creation of smart factory	27	5,20%
Search for safety from a productivity point of view	17	3,28%
Other measure	13	2,50%
Introduction of tailor-made automation	10	1,93%

How long do you think the challenge of supply chain bottlenecks will **persist in your country?**



Results split by country

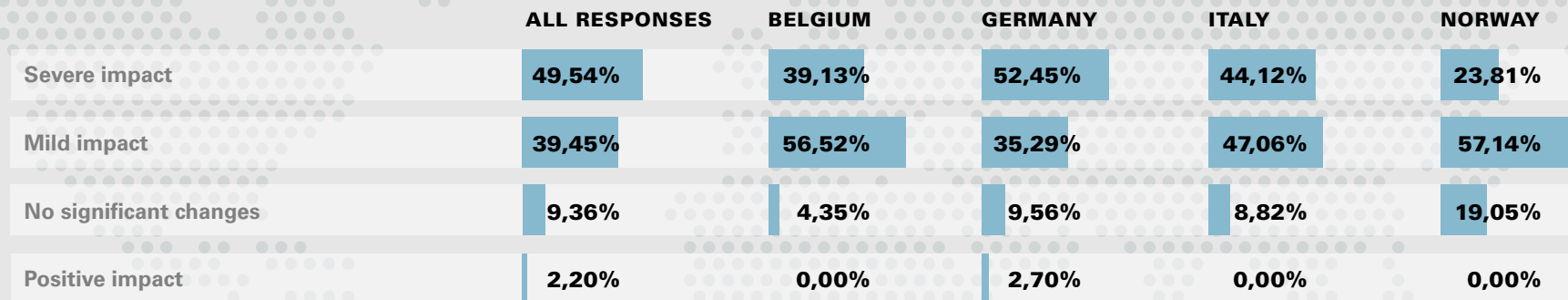
Relevant statements by country based on participant numbers can be made for **Belgium, Germany, Italy and Norway.**



How do you assess the economic impact of supply chain bottlenecks
in your country?

	ALL COUNTRIES	BELGIUM	GERMANY	ITALY	NORWAY
Severe impact	69,17%	56,52%	72,09%	73,53%	33,33%
Mild impact	29,72%	43,48%	25,00%	23,53%	61,90%
No significant changes	2,75%	4,35%	2,43%	2,94%	4,76%
Positive impact	0,37%	0,00%	0,49%	0,00%	0,00%

What is the impact of supply chain bottlenecks on
your company / companies?



What are the main causes of supply chain bottlenecks **in your industry?**

	ALL RESPONSES	BELGIUM	GERMANY	ITALY	NORWAY
China's rigid no-covid strategy	42,60%	34,78%	44,23%	23,53%	33,33%
Russia-Ukraine war	38,21%	56,52%	39,07%	14,71%	47,62%
Shipping capacity	27,06%	13,04%	28,01%	23,53%	47,62%
Shortage of shipping containers	15,72%	8,70%	13,51%	20,59%	19,05%
Shortage in logistics services due to catch-up effects (post-Corona)	22,67%	26,09%	22,60%	11,76%	38,10%
Purchasing behavior of commercial operators	10,97%	0,00%	12,04%	14,71%	4,76%
Labor shortage	17,37%	30,43%	18,18%	11,76%	9,52%
Higher energy costs	30,90%	26,09%	30,22%	52,94%	23,81%
Increase in the price of raw materials / Shortage of raw materials or vital components	60,15%	60,87%	54,79%	76,47%	61,90%
Other cause	3,11%	8,70%	7,13%	0,00%	0,00%

In your opinion, what are the **3 biggest challenges** for companies due to supply bottlenecks?

	ALL RESPONSES	BELGIUM	GERMANY	ITALY	NORWAY
Lost sales	45,52%	43,48%	46,19%	32,35%	57,14%
Cancelled orders	21,94%	21,74%	22,11%	20,59%	38,10%
Customer losses	14,44%	0,00%	13,27%	20,59%	19,05%
Rising number of customer complaints	21,94%	13,04%	22,85%	20,59%	9,52%
Declining customer loyalty	14,63%	17,39%	14,25%	20,59%	23,81%
Cost increase due to sourcing otherwise	70,57%	73,91%	70,76%	67,65%	61,90%
Profit slump in project business: margin & profitability	33,46%	30,43%	32,92%	44,12%	23,81%
Delayed invoicing	9,51%	8,70%	8,35%	23,53%	0,00%
Financial bottlenecks	24,31%	21,74%	25,06%	20,59%	23,81%
Substitution of raw materials / substitutes	36,75%	56,52%	37,10%	26,47%	33,33%
Other challenge	6,95%	13,04%	7,13%	2,94%	9,52%

How strong do you think **each industry** in your country **is affected** by supply chain bottlenecks? (Please rate at least 15 industries)

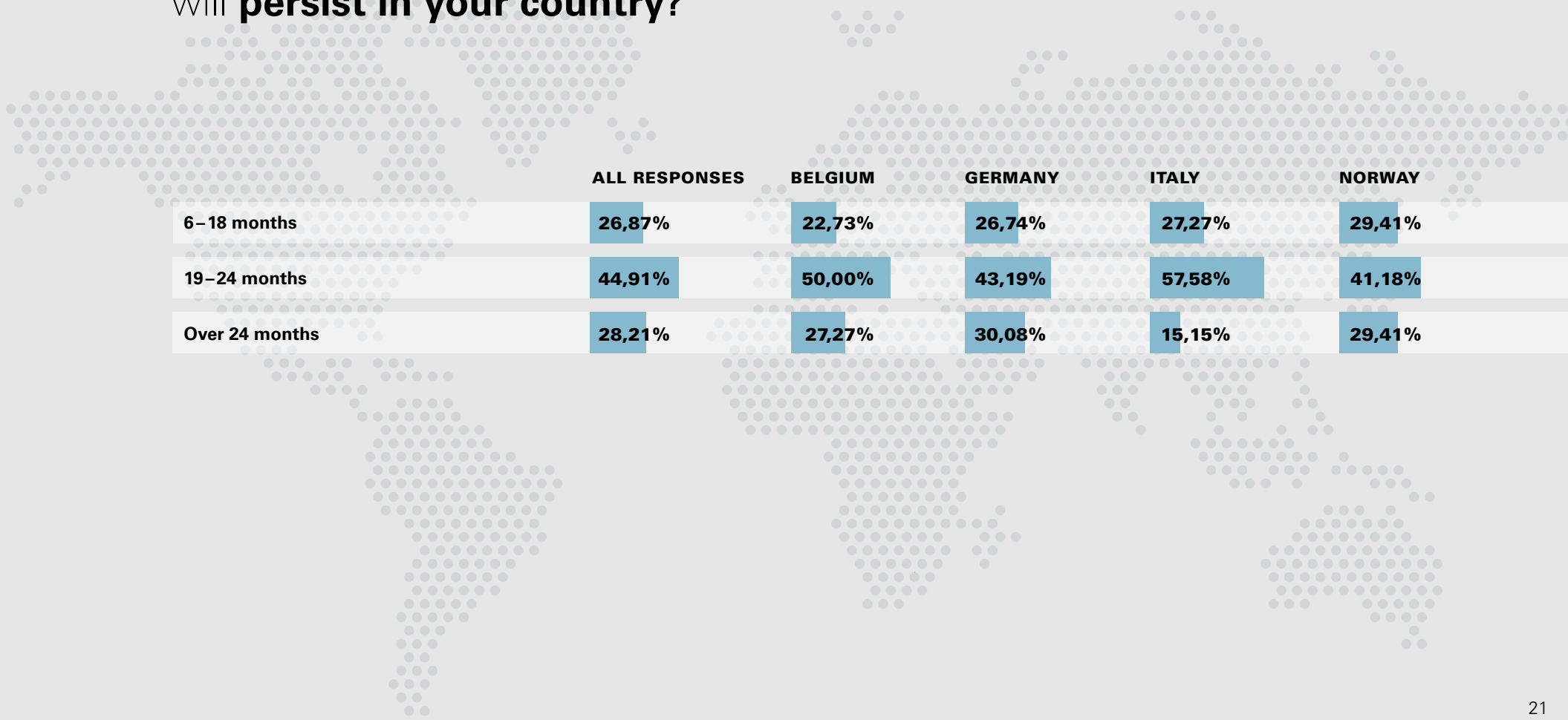
	ALL RESPONSES	BELGIUM	GERMANY	ITALY	NORWAY
Agricultural	18,65%	40,91%	19,20%	31,25%	5,88%
Automotive	66,64%	61,90%	73,30%	75,76%	47,06%
Banking, Finance & Insurance	0,89%	0,00%	1,23%	0,00%	0,00%
Chemicals	31,09%	18,18%	40,17%	27,27%	17,65%
Construction	37,17%	38,10%	40,97%	33,33%	29,41%
Consumer Goods & Retail	21,13%	27,27%	20,83%	28,13%	18,75%
Energy	60,18%	70,00%	66,29%	78,13%	35,29%
Healthcare & Life Sciences	6,75%	9,09%	7,72%	15,63%	0,00%
IT	11,91%	9,09%	14,60%	9,68%	5,88%
Manufacturing	41,94%	42,86%	44,63%	63,64%	5,88%
Pharmaceuticals	11,39%	10,00%	14,77%	15,15%	6,25%
Private Equity	3,22%	4,55%	4,47%	0,00%	6,67%
Public Sector	3,10%	4,76%	4,15%	0,00%	0,00%
Plant and Machinery	29,22%	18,18%	34,02%	41,94%	6,25%
Steel, Metal & Plastics	51,47%	38,10%	55,46%	61,29%	37,50%
Telecommunication, Media & Entertainment	7,01%	0,00%	10,25%	0,00%	6,25%
Services	6,22%	4,76%	9,01%	3,23%	0,00%
Transportation, Logistics and Traffic	56,71%	45,45%	59,50%	63,64%	35,29%
Utilities	20,31%	28,57%	19,87%	37,04%	12,50%
Tourism	11,94%	20,00%	14,29%	14,29%	5,88%

VERY STRONG

In your opinion, what are the **5 TOP measures** to address the supply chain bottleneck in your industry?

	ALL RESPONSES	BELGIUM	GERMANY	ITALY	NORWAY
Increase level of inventory	37,38%	31,82%	39,07%	30,30%	17,65%
Develop new suppliers locally	55,88%	45,45%	56,04%	57,58%	52,94%
Diversify suppliers	49,13%	40,91%	49,61%	57,58%	52,94%
Reduce number of SKUs	9,25%	18,18%	8,23%	12,12%	5,88%
Build up storage capacity	17,73%	18,18%	17,99%	0,00%	23,53%
Reduce specs for flexibility in purchasing	15,41%	4,55%	16,71%	15,15%	0,00%
Increase lead time to customers	24,47%	27,27%	24,68%	12,12%	23,53%
Establish near-shore production facilities	23,70%	27,27%	21,08%	24,24%	35,29%
Increase prices	41,04%	36,36%	44,22%	24,24%	23,53%
Enhance customer relationship management	13,68%	9,09%	12,34%	33,33%	11,76%
Push technical development	19,08%	9,09%	18,25%	27,27%	23,53%
Substitute raw materials	28,32%	27,27%	29,56%	24,24%	23,53%
Use verticalization strategies	7,51%	4,55%	7,71%	9,09%	0,00%
Form purchasing / procurement pools	7,71%	18,18%	6,17%	21,21%	0,00%
Process innovation (procurement planning)	16,76%	9,09%	15,94%	36,36%	17,65%
Interfunctional planning	20,62%	18,18%	21,59%	18,18%	23,53%
Creation of smart factory	5,20%	9,09%	4,88%	12,12%	0,00%
Partnership with servicers / logistics operators	11,95%	13,64%	10,28%	18,18%	35,29%
Introduction of tailor-made automation	1,93%	0,00%	2,06%	3,03%	0,00%
Workflow optimization	17,53%	13,64%	17,74%	12,12%	41,18%
Sustainability	11,75%	27,27%	12,34%	6,06%	11,76%
Search for productivity safety	3,28%	0,00%	3,60%	0,00%	0,00%
Improve leadership and supply competence	20,62%	36,36%	19,79%	18,18%	29,41%
Financial planning	11,95%	18,18%	11,83%	9,09%	17,65%
Other measure	2,50%	4,55%	2,83%	0,00%	0,00%

How long do you think the challenge of supply chain bottlenecks will **persist in your country?**



	ALL RESPONSES	BELGIUM	GERMANY	ITALY	NORWAY
6–18 months	26,87%	22,73%	26,74%	27,27%	29,41%
19–24 months	44,91%	50,00%	43,19%	57,58%	41,18%
Over 24 months	28,21%	27,27%	30,08%	15,15%	29,41%

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WHEN IT'S TIME TO ACT –
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