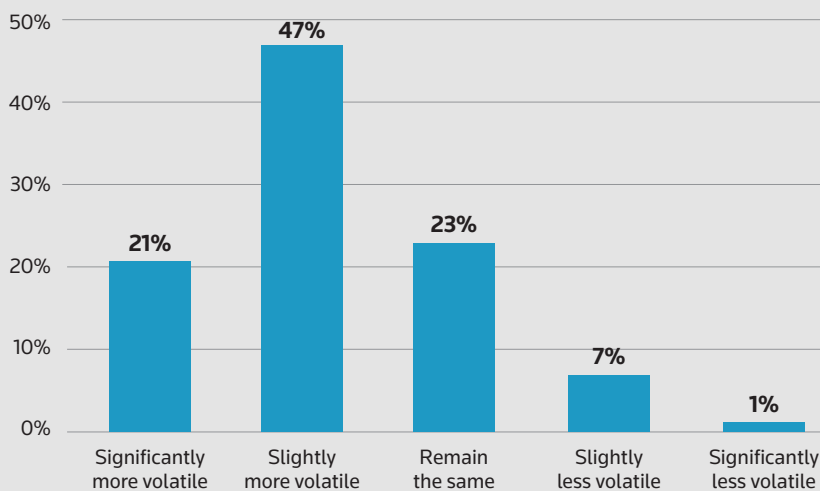


# THE STATE OF EUROPEAN SUPPLY CHAINS IN 2025

## European supply chains face higher uncertainty in 2025

**68%** of European supply chain professionals expect **more volatility** in 2025.

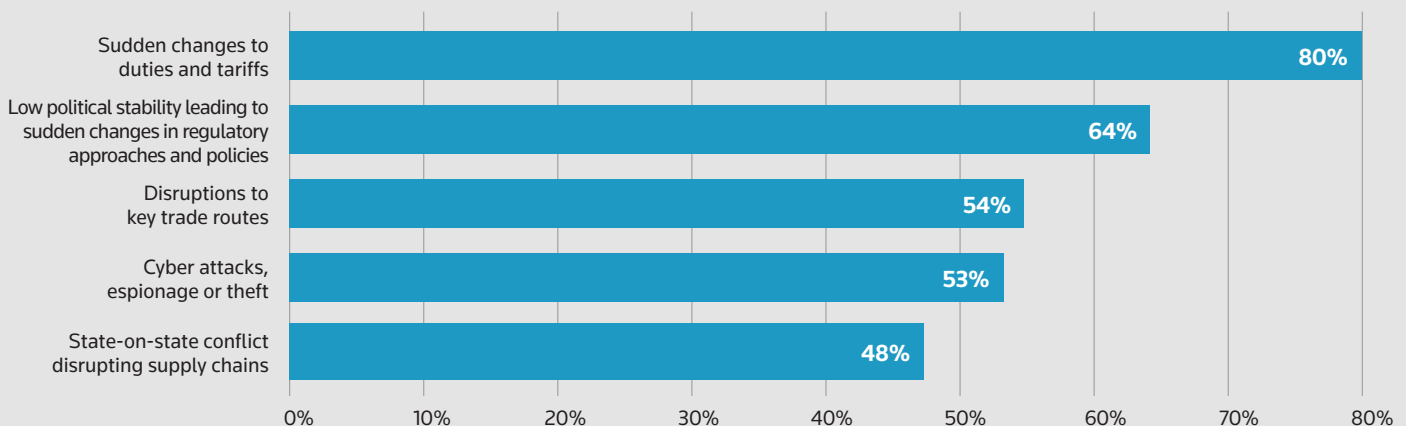
How volatile do you expect the European supply chain environment to be when compared to 2024?



**Tariffs and duties** lead the list of geopolitical risks.



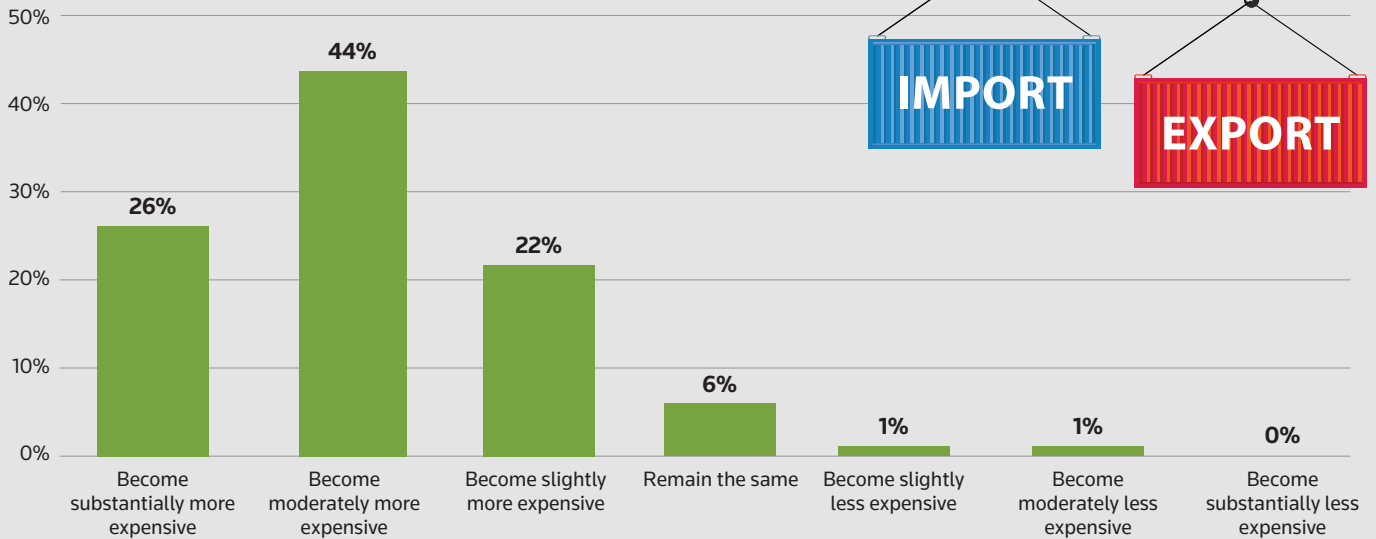
## Top five geopolitical risks to supply chains





A shifting international trade landscape is why **92%** anticipate the **cost of importing and exporting** to increase

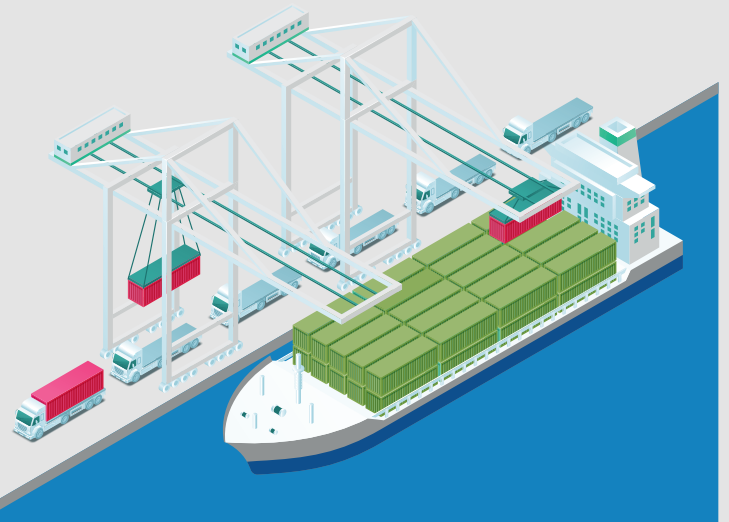
#### Expected cost impact from trade tariffs and regulations in 2025



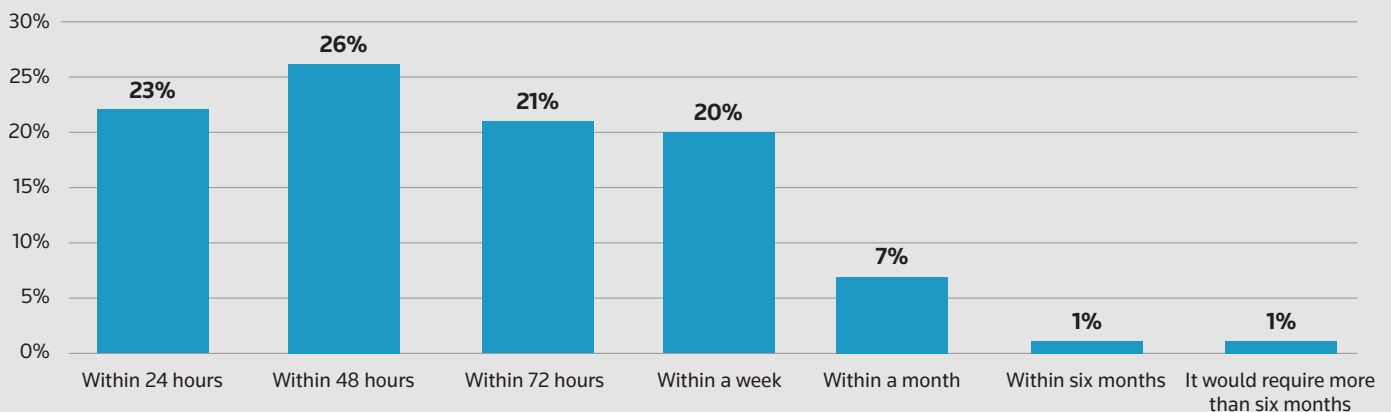
#### Can Europe cope?

Despite the volatility, European supply chain professionals are confident.

**70%** say that they can **respond to a sudden change** in conditions within 72 hours.

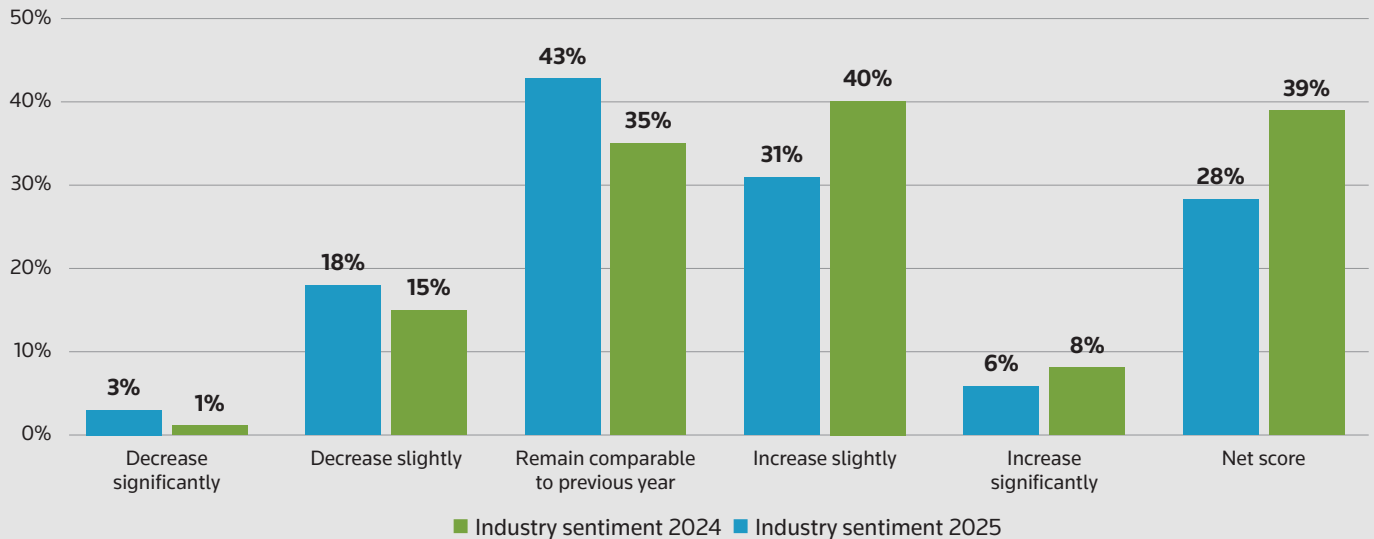


#### How fast can European businesses make impactful supply chain decisions following a change in conditions?



And expectations of **global growth in the demand** for goods is up substantially YoY – from a **+28%** net score to **+39%**.

#### How do you expect global demand for goods to change in 2024/2025?



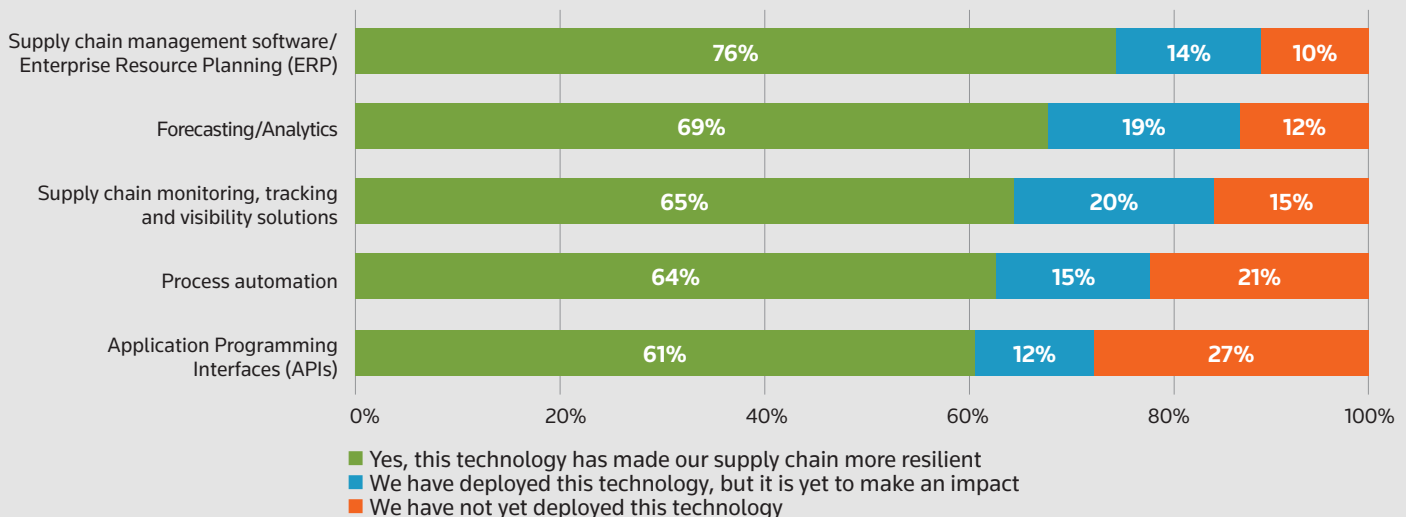
### Planning and preparation allows resilient organisations to react

The emerging environment of swirling tariff regimes and sudden shifts in costs and demand patterns has put a premium on planning tools.

**Supply chain management software/ Enterprise Resource Planning (ERP), forecasting and analytics, and supply chain monitoring, tracking and visibility solutions** are the top tools to generate resilience.



#### Top five supply chain technologies enhancing resilience



It is clear from our results that supply chains are more resilient if they can adequately gather data, organise it well and share the conclusions across a **skilled, connected** and **well-led** workforce.

We identified **highly resilient organisations** in the survey. They were more likely to ...

- Have a senior leadership that **understood the challenges in supply chains**: +15%.
- Have enough **skilled data and IT employees**: +15%.
- Have a **technology strategy** that **meets the needs of their organisation** (+16%) and a **training protocol** in place to **embed new technologies** (+14%).
- **Utilise key technologies** and use them to **build resilience** including deploying **control towers** (+16%) and **predictive or prescriptive analytics** (+21%) and deriving resilience from the **Internet of Things** (+14%), **Application Programming Interfaces** (+13%) and **cloud computing and 5G** (+12%).
- Be able to see what is happening in their supply chains, with high performers more likely to **report real-time visibility** over at least half of their supply chain (+11%) and to be using a **single source of truth** (+12%).
- Be able to **share data efficiently**, both internally (+11) and externally (+15%).

All of which allows them to react more quickly in the event of disruptions or sudden changes in conditions.

## The EU Corporate Sustainability Reporting Directive (CSRD) is here but are European businesses ready?

Considerable gaps remain in understanding what is needed for CSRD among European businesses. Just **two thirds** who said that CSRD will apply to them think they **understand it at least quite well**, while 20% of those in companies with revenues greater than €250m, and therefore likely required to comply, said they don't know if CSRD is applicable.

While **79%** said they had adequate targets and reporting for **Scope 3 emissions**, that fell to **57% for water use** and **46% for ecosystems impact**, all of which are required to comply with the directive.

### About the research

Reuters Events, Supply Chain in partnership with Maersk surveyed 391 European supply chain professionals from across the sector in Q1 2025.

### About Maersk



A.P. Moller - Maersk is an integrated transport and logistics company. We connect and simplify trade to help our customers grow and thrive. At Maersk, we help our key retail, lifestyle, technology, automotive, FMCG, chemical customers with seamless solutions, led by experts who understand the unique requirements and standards of their respective industry. We leverage this knowledge to build our supply chain solutions around customer needs, allowing us to serve some of the world's most visible brands. The Maersk team works together with customers, living their strategy and growth plans. Integrating our warehousing solutions with other Maersk services such as Ocean, Airfreight, Inland, Customs, and SCM facilitates end-to-end visibility that enhances flow control in a manner that customers can pace their growth and maximise efficiencies and performance. In other words, with Maersk, our customers can bring more opportunities within reach and reduce waste, turning your logistics strategy into a key competitive advantage.