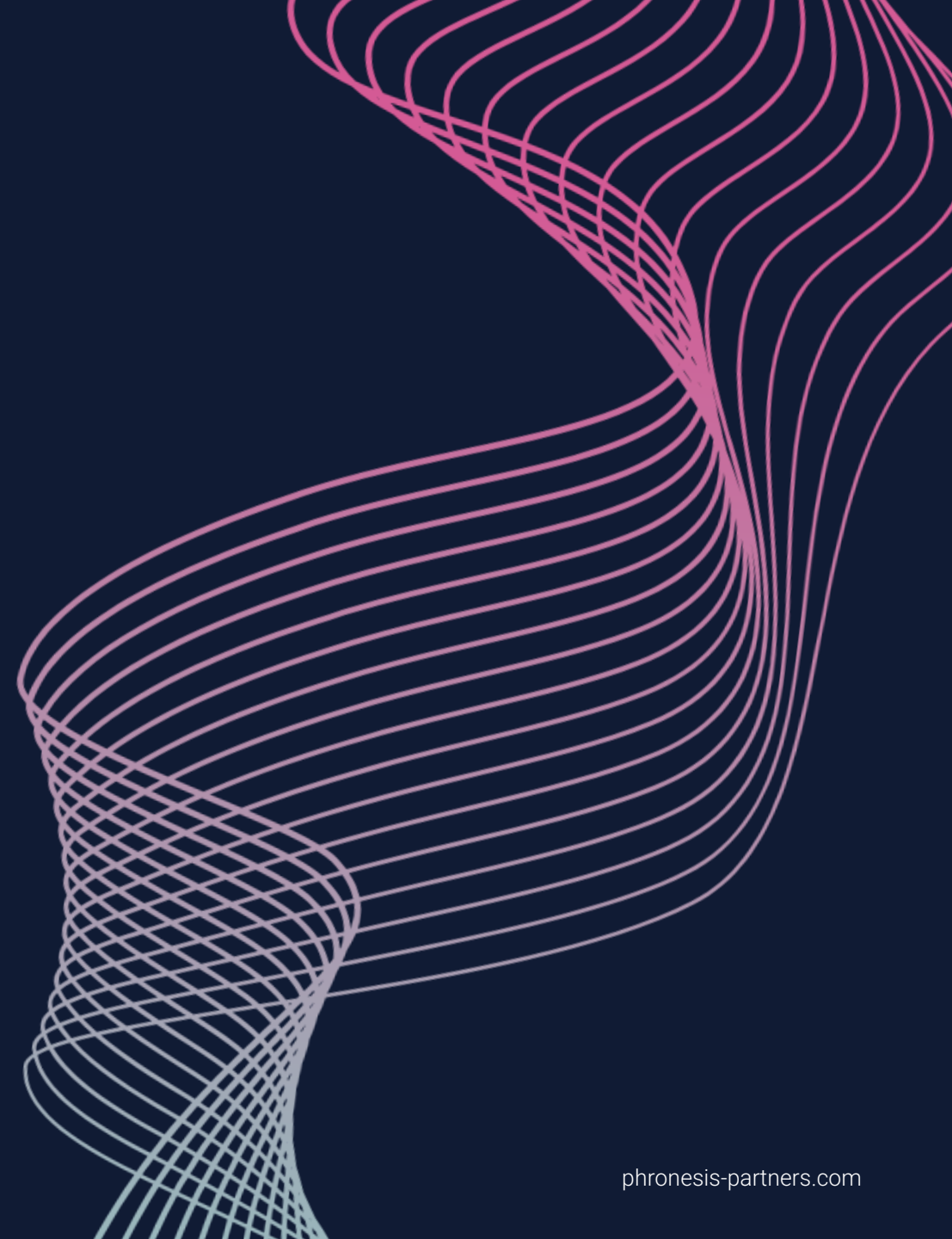


Redesigning Supply Chains for a Disrupted World



Agenda

- 4:00 PM ● **Arrival and introductions**
- 4:30 PM ● **Welcome by Stephen Morgan, Phronesis Partners and Bobby Simms, Spheres Advisors**
- 4:40 PM ● **In conversation with Paul Polman**
- 5:10 PM ● **Roundtable discussion**
- 6:10 PM ● **Post-roundtable refreshments**

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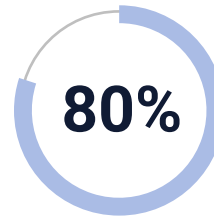


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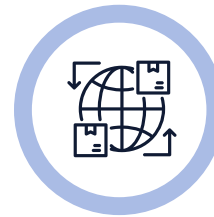
Disruptions amidst push for regionalisation



The Fragility of the Global Model



80% of organisations suffered at least one supply-chain disruption in 2024 —the highest on record (*BCI 2025*)

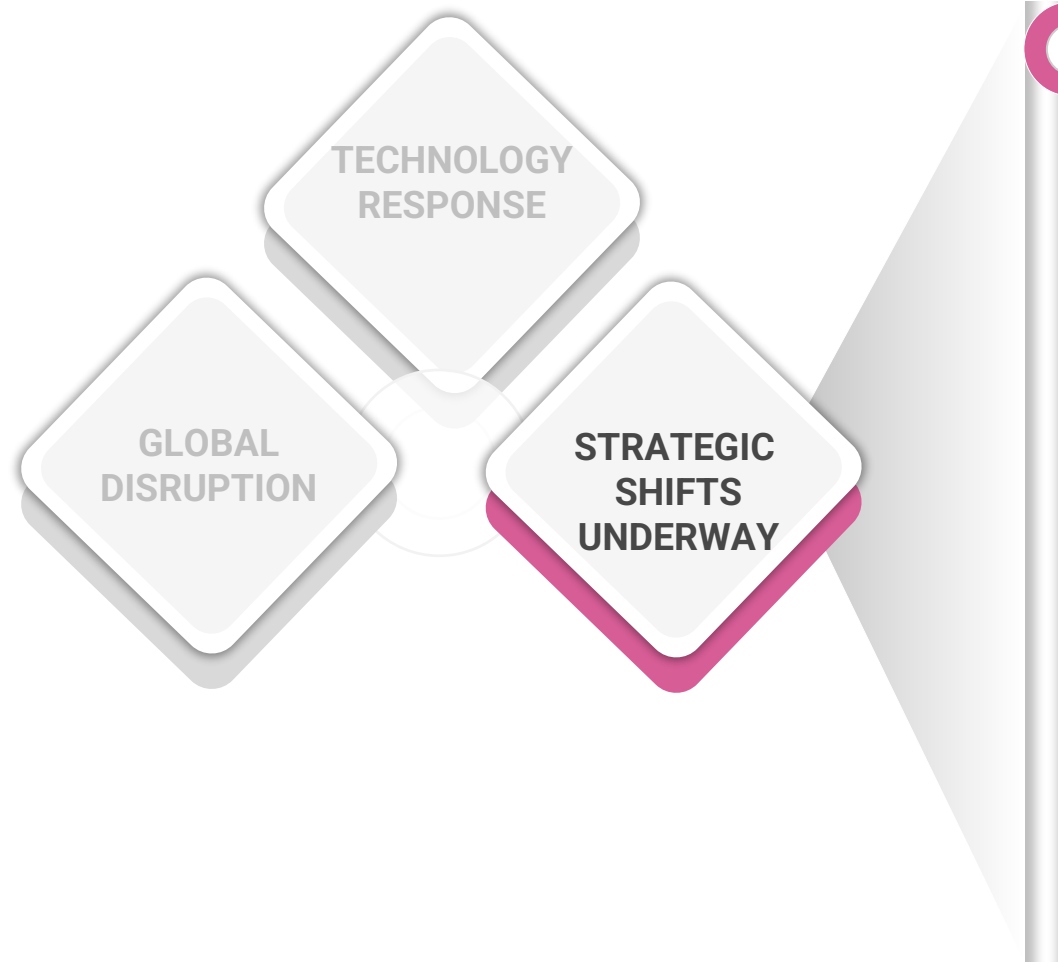


OECD warns: aggressive reshoring could **cut global trade by 18%** and reduce GDP by up to **12%** in some economies (*OECD 2025*)



Global systems built for cost are now optimised for risk.

Supply chains are being rewired in real time across industries



Supply Chains Are Being Redrawn

95%

95% of executives cite **tariffs** as a primary disruptor, pushing sourcing from China → Vietnam, Cambodia, Mexico, India (*Inspectorio 2025*)

91%

91% of operations leaders plan major supply-chain changes due to US trade policy shifts (*PwC 2025*)



1 in 2 US businesses plan to **increase near-shoring** volumes in 2025 (*QIMA 2025*)

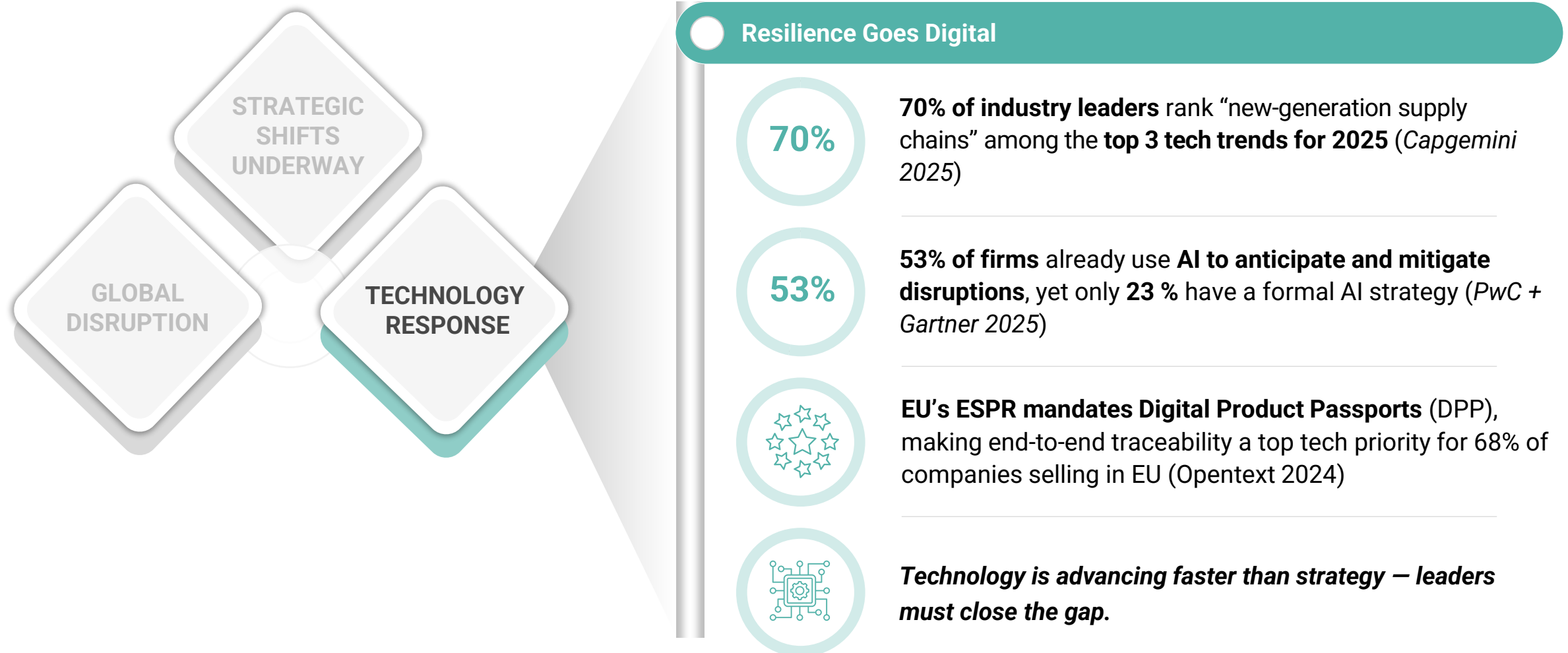


CBAM regulations are expected to **add over US\$222B** in costs for European supply chains by 2035, accelerating the shift toward alternative sourcing destinations (*S&P 2025*)



Regionalisation is no longer theoretical – it's operational.

Technology emerges as the primary engine of resilience and continuity



From efficiency to resilience: the new logic of global competitiveness

THEME	THEN: Hyper-Globalisation (till 2019) 	NOW: Resilience Era (Post 2019) 
 Business Goal	Minimise cost, maximise scale	Maintain continuity, adaptability & stakeholder trust
 Supply Chain	Global, centralised, offshore	Regionalised, diversified, “friend-shored”
 Operating Model	Just-in-time, lean, fragile	Just-in-case, buffered, adaptive
 Decision Drivers	Efficiency, cost arbitrage	Agility, visibility, flexibility
 Technology Role	Automation to cut costs	AI, data & digital twins for foresight
 Sustainability	Compliance or PR exercise	Core to competitiveness & brand value
 Consumer Lens	Global brands, low prices	Local provenance, ethics, authenticity
 Success Formula	Cheapest wins	Fastest to adapt wins

The leaders of the next decade won't be those who avoid disruption – but those who build for it



Operational Resilience

Build flexibility into physical networks

- Multi-sourcing and near-shoring to reduce single-country exposure
- Energy security underwrites physical continuity



Financial Resilience

Keep liquidity and agility at the core of financial design

- Hedge against tariff & currency volatility
- Maintain adaptive cash-flow and inventory financing



Digital Resilience

Turn data into foresight

- AI-driven forecasting & scenario planning
- End-to-end supply-chain visibility via IoT & blockchain
- Uninterrupted supply of Semiconductor/ chips



Reputational & Impact Resilience

Earn and sustain stakeholder trust

- Responsible sourcing, traceability, circularity
- ESG performance integrated into brand equity



Organizational Resilience

Put Supply Chain at the Centre

- Elevate the Chief Supply Chain Officer to core leadership
- Integrate sustainability, procurement, and operations under supply chain, not vice-versa
- Build executive-level cross-functional governance for risk, ESG, and continuity

Collaboration is no longer optional; it's the architecture of future resilience

What This Means for Leaders



01

Think in ecosystems, not chains — resilience comes from shared access

02

Diversify inputs — energy, chips, and materials are the new competitive frontier

03

Operationalize intelligence — AI as a control tower, not a lab project

04

Build trust through transparency — compliance and circularity will define credibility



Tomorrow's resilient supply chains will be built by partners who collaborate, not compete, across boundaries

Thank you

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