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Protected But Not Resilient

European Supply Chain Survey 2026

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Senior supply chain leaders

100

Industry sectors

4

European countries

4

Fieldwork period

Q4 2025 – Q1 2026

Countries

France, UK, Germany, Netherlands

Seniority

C-suite, Director and Manager level

Method

Structured telephone interviews

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Foreword

We commissioned this research expecting to find that European supply chain leaders had made real progress in managing disruption. The past few years have been formative – geopolitical volatility, persistent cost pressure, tariff uncertainty – and we assumed this experience had built real resilience.

The data tells a more complicated story.

Nine in 10 of the leaders surveyed have a formal risk strategy. Nearly 8 in 10 use technology to manage supply chain risks. Yet 7 in 10 still have unresolved challenges, and fewer than 1 in 10 rate their mitigation practices as highly effective. The investment has been made. The return is not coming through.

What this survey reveals is not a lack of intent. It is a gap between adoption and effectiveness – in strategy, in technology, and in the way organisations work with their logistics partners. That gap has a cost, and it is unevenly distributed. The sectors most exposed to disruption are often the least well-equipped to manage it.

One hundred senior supply chain leaders across France, the United Kingdom, Germany, and the Netherlands participated in structured telephone interviews. We have not filtered the findings for comfort. What follows is an honest picture of where European supply chain risk management stands – and what it will take to close the gaps this research identifies.

Kim Overman

Regional Vice President, EMEA
APL Logistics

01 Executive Summary

That gap between investment and outcome is the central finding of this survey. Investment in both has outpaced the effectiveness of either. European supply chains are not unprotected – they are partially protected in ways that are not fully working.

Six headline findings

66% **experienced supply chain disruptions in the past 12 months**

Automotive was the most disrupted sector (77%), with industrial & manufacturing (64%), retail (63%), and consumer goods (62%) all above 60%. Automotive and retail are jointly the most operationally severe – 41% of disrupted respondents in each sector rated operational impact at 4 or 5 out of 5. Nearly half of disrupted respondents (45%) suffered significant or severe financial impact.

90% → 69% **Ninety percent have a formal risk strategy – yet 69% still have unresolved challenges**

Only 8% rate their mitigation practices as highly effective (5 out of 5). Overall, 69% report unresolved challenges – rising to 71% among those with a formal strategy. Having a strategy and having an effective one are not the same thing.

33% **have high confidence in their 3PL's ability to manage disruptions**

Seventy percent include 3PLs in their risk strategy, and 79% say their 3PL communicates disruptions in a timely manner – yet confidence in actual capability remains low. The gap is not in communication but in active disruption management.

63% **have already adjusted sourcing strategies in response to trade tensions and tariffs**

Geopolitical pressure is a live operational decision. Increased visibility into supply sources was the most common adjustment cited.

3% **cite resilience as a standalone investment priority**

Automation (30%) and sustainability (19%) lead investment intentions. Resilience is being absorbed into other budget lines rather than funded as a dedicated capability – despite 69% of respondents reporting unresolved challenges.

69% **of technology users still have unresolved challenges – almost identical to the 70% who use none.**

The tools most commonly reported are ERP and WMS platforms, designed for operational management rather than risk anticipation. No clearly identifiable purpose-built risk or visibility platforms were reported.

Summary statistics

Metric	%	n
Experienced supply chain disruptions (past 12 months)	66%	66/100
Suffered significant or severe financial impact (of disrupted)	45%	30/66
Disruptions affected product flows and inventory levels (of disrupted)	70%	46/66
Adjusted sourcing strategies due to trade tensions / tariffs	63%	63/100
Have a formal risk management strategy in place	90%	90/100
Use technology to manage supply chain risks	77%	77/100
Current risk solutions have left challenges unresolved	69%	69/100
Open to adopting new solutions (of those who answered)	56%	47/84

02 About the Survey

This report is based on structured telephone interviews with 100 senior supply chain leaders across France, the United Kingdom, Germany, and the Netherlands, conducted in Q4 2025 and Q1 2026 by an independent research partner. Respondents hold supply chain decision-making authority at manager level or above, spanning retail, industrial & manufacturing, automotive, and consumer goods sectors.

For Q14 (future challenges), responses were coded thematically; compound responses were counted once per theme, so a response citing both supplier reliability and cost was recorded as a mention of each.

Percentages are based on the full respondent base unless otherwise stated and may not sum to exactly 100% due to rounding.

03 Disruption is the baseline

66%
experienced supply chain disruptions in the past 12 months

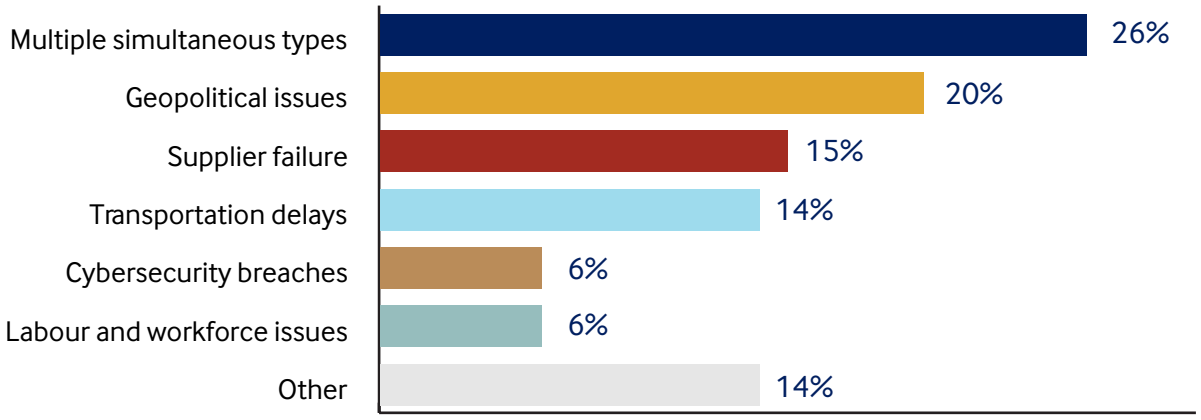
45%
of those disrupted suffered significant or severe financial impact

70%
of disrupted respondents report impacts to product flows or inventory

Two-thirds of European supply chain leaders experienced disruptions in the past 12 months. At 66%, the majority are not managing the theoretical risk of disruption – they are managing its active consequences. Disruption rates are above 60% across all four sectors, led by automotive at 77%, with industrial & manufacturing at 64%, retail at 63%, and consumer goods at 62%.

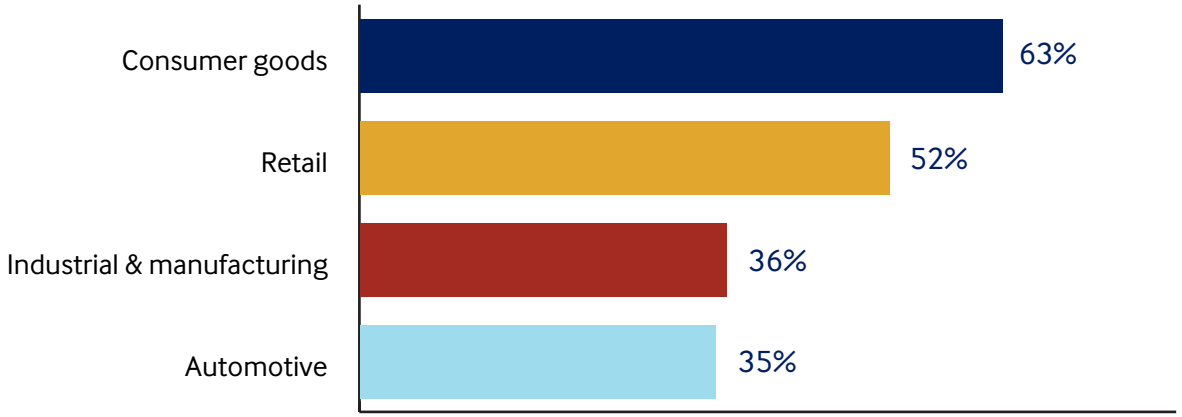
No single risk category dominates. More than a quarter of disrupted respondents identified multiple simultaneous types as their primary disruption cause, although this likely understates the true level of overlapping disruption because respondents were asked to identify only their main cause.

Disruption causes



The financial consequences are serious for nearly half of those disrupted: 45% (30 of 66) suffered significant or severe financial impact, with variation across sectors:

Significant or severe financial impact by sector



Of those who experienced disruptions, 70% said they affected product flows and inventory levels. Looking three to five years ahead, cost inflation is the top concern, followed closely by supplier reliability and geopolitical instability. Two of the top three forward concerns – supplier reliability and geopolitical instability – are already the primary disruption drivers today. Cost inflation, the third, is widely seen as their consequence. European supply chain leaders are not anticipating a fundamentally different risk environment. They are anticipating more of the same.

Disruption is not an outlier event. At 66%, with financial consequences for nearly half of those affected and rates above 60% across all four sectors, it is the baseline condition of European supply chain management.

04 The strategy-effectiveness gap

90%
have a formal risk management strategy in place

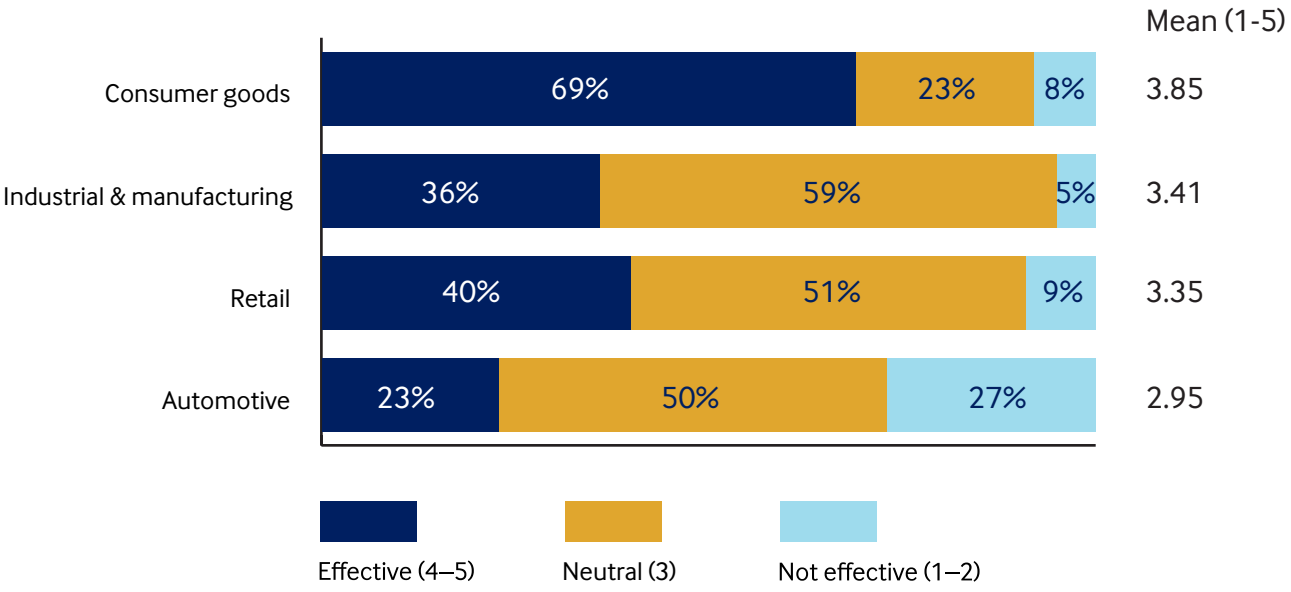
71%
of those still have unresolved challenges

8%
rate their mitigation practices as highly effective (5 out of 5)

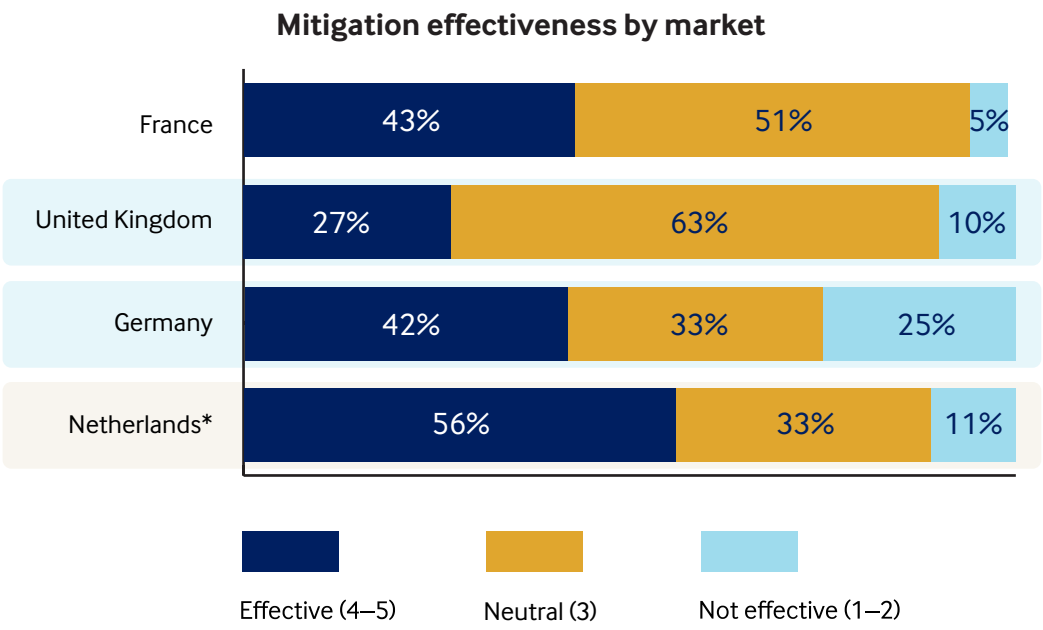
Nine in 10 respondents have a formal risk management strategy in place. That 90% would suggest that organisations are well-prepared to manage risk. The data does not support that conclusion. Despite 90% having a formal strategy, 69% still report unresolved challenges – rising to 71% among those with a formal strategy. Strategy adoption is near-universal; strategy effectiveness is not.

On a 1-to-5 scale, the mean effectiveness score is 3.34; nearly half (49%) score 3 – the neutral midpoint. Sector variation is significant, with automotive having the lowest high-effectiveness rate, highest not-effective rate, and lowest mean:

Mitigation effectiveness by sector



Country-level variation is wide:



**Indicative only, n = 9*

Germany is the most polarised market – a significant share of both high and low scorers. The UK is the most neutral: 63% cluster at the midpoint, neither confident nor concerned. The Netherlands reports the highest confidence, though its small sample means results should be treated with caution.

Technology tells the same story. Of the 77% who use technology, 69% still have unresolved challenges – almost the same as the 70% who do not. The difference is negligible. The tools most reported are SAP (18%), generic ERP (11%), and WMS (8%) – all designed for operational management, not risk anticipation. A minority of respondents explicitly mention automated alerts, while over half rely on human-driven channels such as supplier or 3PL communication.

Having a strategy and having an effective one are not the same thing. Investment in both strategy and technology has spread faster than the effectiveness of either – and the data makes that gap precise.

05 The 3PL confidence gap

79%

say their 3PL communicates disruptions in a timely manner

33%

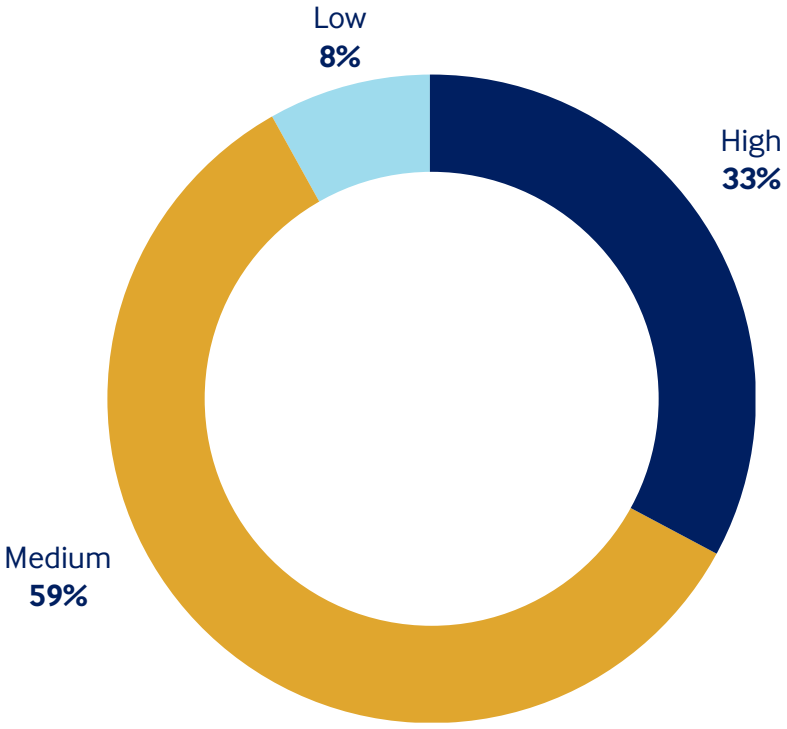
have high confidence in their 3PL's ability to manage disruptions

12%

of respondents who rated operational severity at 4–5 have high confidence in their 3PL's ability to manage disruptions

Seven in 10 respondents include 3PLs in their supply chain risk strategy, and 79% say their 3PL communicates disruptions in a timely manner. Yet only 33% have high confidence in their 3PL's ability to manage disruptions. The problem is not communication – it is what happens after the notification. Fifty-nine percent have medium confidence in their 3PL's capability; 8% have low confidence. Consumer goods and retail jointly report the highest timely communication rates (85% and 84%, respectively), while industrial & manufacturing report the lowest at 68%.

The confidence gap matters most among the most severely affected. Of the 26 respondents who rated operational severity at 4 or 5, 88% have medium confidence in their 3PL – just 12% have high confidence.

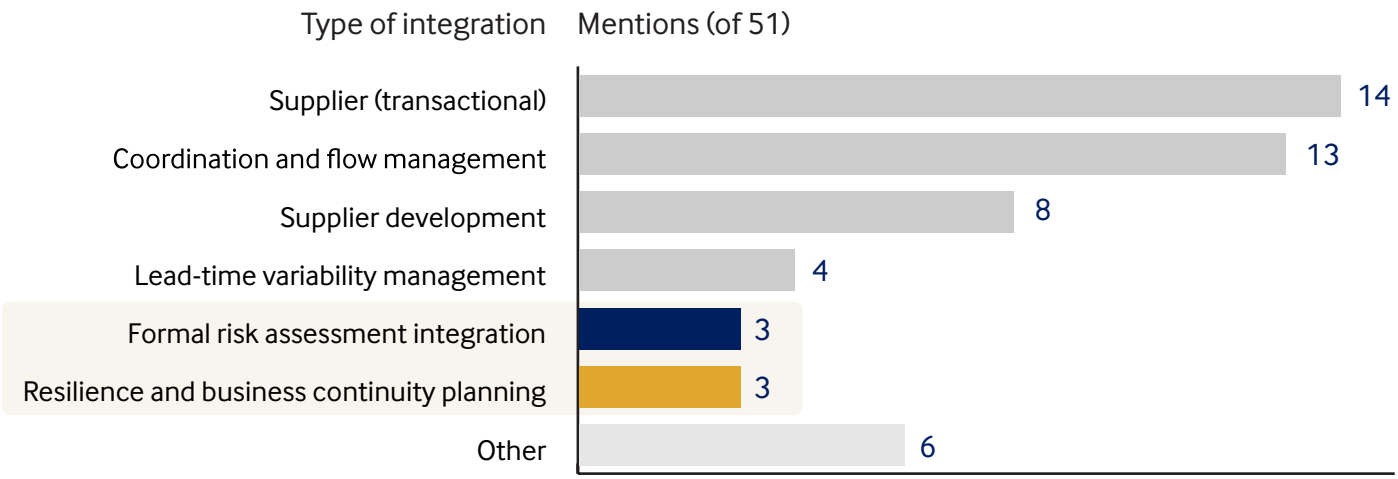


Confidence levels by sector:

Retail leads on confidence yet still reports an 81% unresolved challenge rate. Industrial & manufacturing has the lowest high-confidence rate at 23%, despite 68% of respondents in that sector rating their 3PL communication as timely. Confidence in notification does not equate to confidence in management.

Of the 70 respondents who include 3PLs in their risk strategy, 51 described the integration.

How 3PLs are integrated – mentions (of 51 who described)



The two forms most relevant to active disruption management – formal risk assessment and resilience planning – were the least common. 3PLs are named in strategies but rarely embedded in resilience planning. The relationship is transactional where it needs to become structural.

3PLs are performing their least demanding function well – notifying clients promptly when disruptions occur. The more demanding function is active disruption management. Of the 51 respondents who described their 3PL integration, just three cited resilience or business continuity planning.

06 Geopolitical pressure and investment priorities

63%

have already adjusted sourcing strategies in response to trade tensions and tariffs

3%

are prioritising resilience as a standalone investment priority

79%

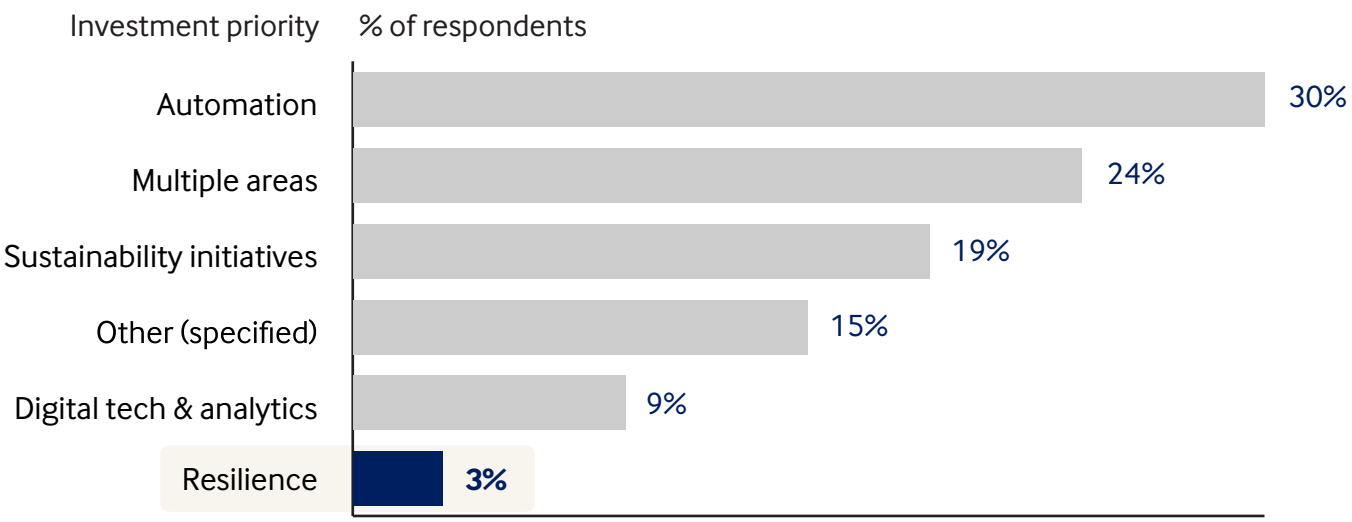
report accurate, timely data visibility – contradicted by open-text responses

Trade tensions and tariffs are a present operational reality. With 63% of respondents already adjusting sourcing strategies in response, geopolitical disruption has moved from strategic concern to operational decision, with consistently high rates across sectors (62–64%).

However, among the 36 respondents who described their adjustments, increased visibility into supply sources (11 mentions) was the most common response, indicating monitoring rather than fundamental restructuring.

Investment intentions reveal a deeper misalignment. Resilience as a standalone budget line accounts for just 3% of responses.

Investment priorities – % of respondents



Sixty-nine percent of respondents report unresolved challenges, while 3% prioritise resilience as a dedicated investment. The implication is not that resilience investment is absent – automation and sustainability programmes carry resilience implications – but that it is embedded in other budget lines rather than funded as a standalone capability. That distinction matters: embedded investment is harder to measure, attribute, and scale. Seventy-nine percent report accurate, timely data visibility, but open-text responses point to persistent gaps, including limited visibility beyond tier-1 suppliers, hidden bottlenecks, and dashboards that report the past rather than inform forward decisions.

Organisations are watching their supply chains more carefully. The underlying dependencies – and the underinvestment in dedicated resilience – largely remain in place.

07 What needs to change

69%

report that current risk management solutions have left important challenges unresolved

88%

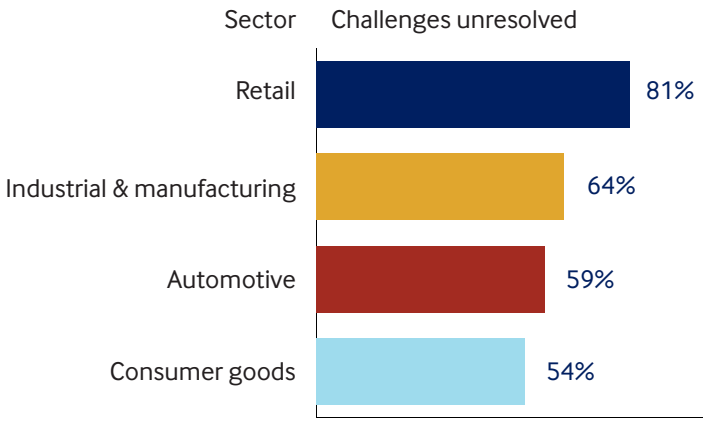
Germany's unresolved challenge rate – the highest of the four markets

81%

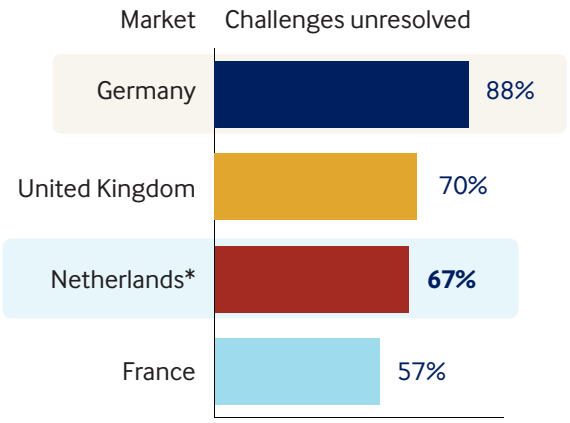
of retail respondents report unresolved challenges – the highest of any sector

Sixty-nine percent of respondents report that current risk management solutions have left important challenges unresolved. The picture varies by sector and is more pronounced by country:

Challenges unresolved by sector



Challenges unresolved by market

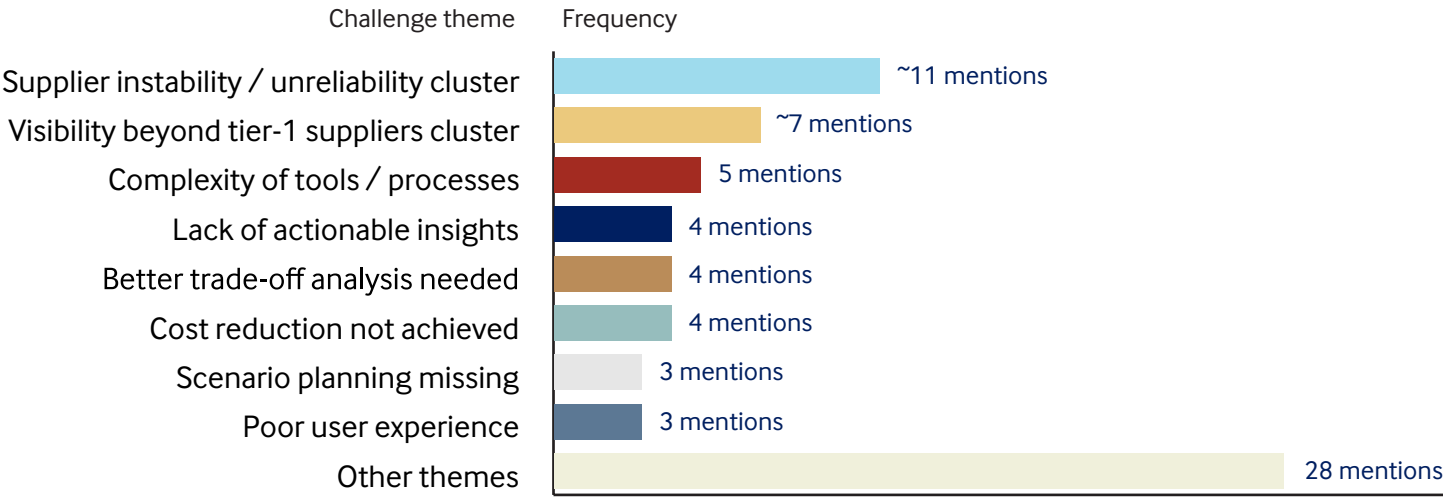


**Indicative only, n = 9*

Despite the highest strategy adoption rate (95%), the highest 3PL confidence (40% high), and a timely communication rate of 84%, retail reports the highest unresolved challenge rate of any sector at 81%. Having a strategy, deploying technology, and rating 3PL communication highly has not resolved the underlying challenges.

The largest single identified challenge cluster is supplier instability and reliability, with approximately 11 mentions across all four sectors. Decision-support themes, including actionable insights, trade-off analysis, and scenario planning, collectively match this at 11 mentions and also appear across every sector. Visibility beyond tier-1 suppliers accounts for approximately seven mentions, and of the respondents citing this as their main challenge, none rated their mitigation effectiveness above the neutral midpoint.

Challenge themes identified in open-text responses



Figures are indicative, based on qualitative coding of open-text responses. Each of the 69 respondents provided one response; named themes capture the most clearly identifiable categories. Remaining responses are included in "Other".

Of the 84 who answered, 56% are open to new solutions. Retail is the most open at 71%. Automotive sits at 50%, industrial & manufacturing at 47%, and consumer goods at 33%. The open-text responses point in the same direction: the capabilities most wanted are actionable insights, scenario planning, trade-off analysis, visibility beyond tier-1 suppliers, and clear accountability frameworks for disruption response.

The gaps are specific and consistent. Supplier stability and actionable decision support appear in all four sectors' open-text responses; visibility beyond tier-1 is prominent in three of the four. Organisations know what they need – the question is whether they are investing to get it.

08 Findings and implications

The pattern documented in this survey is not one of inaction. It is one of investment without commensurate effectiveness.

Strategy and technology vs. outcomes

Sixty-nine percent have unresolved challenges, only 8% rate their mitigation as highly effective, and the gap between technology users and non-users is negligible. The investment has been made. The return has not been delivered. The tools in use – SAP, generic ERP, WMS – were built for operational efficiency, not risk management. A minority of respondents explicitly mention automated alerts, while over half rely on manual, human-driven channels to detect disruptions in real time. That is not a gap that more investment in ERP will close.

The 3PL relationship

3PLs are included in risk strategies, communicate promptly, and are broadly valued. Only 33% of respondents have high confidence in their 3PL's actual capability to manage disruptions. Only 3 of the 51 respondents who described their 3PL integration cited formal resilience or business continuity planning. For most, the relationship is operational rather than structural – present in risk documentation, absent from resilience planning.

The sector dimension

Automotive is the most disrupted sector and the least effective at managing disruption – a gap that strategy adoption alone has not closed. Retail is the most strategically prepared and the most confident in its 3PL relationships, yet reports the highest unresolved challenge rate at 81% alongside the greatest openness to change – a combination that suggests genuine awareness of the gap. Industrial & manufacturing is in line with automotive on sourcing adjustment at 64%, while its unresolved rate sits slightly below the survey average at 64%. Consumer goods stands apart: the highest effectiveness profile of any sector and the lowest unresolved rate at 54%, yet also the highest financial impact when disruptions occur at 63%.

The country dimension

Germany carries the highest unresolved rate at 88% alongside a polarised effectiveness profile – a significant share of both high scorers and low scorers, which points to wide variation across organisations within the same market. The UK is the most neutral market: 63% sit at the midpoint for mitigation effectiveness, neither confident nor deeply concerned. France reports higher effectiveness scores and a lower unresolved rate than either the UK or Germany. The Netherlands, with a small sample, reports higher effectiveness confidence than the other three markets; results are treated as indicative.

The resilience investment gap

Resilience as a dedicated budget line accounts for 3% of planned investment, while 69% of the same respondents report unresolved challenges. That gap will not close until resilience is treated as a distinct capability requiring its own funding and accountability, not an embedded component of automation or sustainability programmes that cannot be separately tracked or built on. Until resilience sits alongside automation and sustainability as a named priority, the pattern this survey documents is likely to persist.

The pattern is clear. Closing the gap requires different investment decisions – in purpose-built risk tools, in structural 3PL relationships, and in resilience funded as a named priority – not more of the same.

09 Four things the data points to

71%

of those with a formal strategy still have unresolved challenges

Test your strategy, not just your processes

A strategy that has not been tested against real disruption scenarios is a planning document, not a risk management tool. Review yours against a specific, recent disruption: would it have changed the outcome?

69%

of technology users have unresolved challenges – almost identical to non-users (70%)

Audit your technology against the problem you are trying to solve

The tools most widely reported in this survey – SAP, generic ERP, WMS – were built for operational management. No clearly identifiable purpose-built risk or visibility platforms were reported. If your technology tells you what happened after a disruption rather than helping you anticipate one, it is solving the wrong problem.

33%

have high confidence in their 3PL's ability to manage disruptions

Redefine what you expect from your logistics partners

Seventy-nine percent of respondents say their 3PL communicates disruptions in a timely manner. Only 33% have high confidence in their 3PL's ability to manage disruptions. Notification and management are different capabilities. Of the 51 respondents who described their 3PL integration, just three cited resilience or business continuity planning. Consider whether your logistics relationships are structured to manage disruptions – or only to report them.

3%

are prioritising resilience as a standalone investment, while 69% have unresolved challenges

Fund resilience as a named priority

When resilience sits inside automation or sustainability budgets, it becomes invisible – harder to measure, harder to build on, and harder to hold anyone accountable for. It needs its own line. Without it, the gap between investment and effectiveness that this survey documents is unlikely to narrow.

About APL Logistics

APL Logistics is a global supply chain logistics provider specialising in order management solutions – including distribution and fulfilment, customs brokerage, and transportation – operating from 180+ locations across 100+ countries. As a neutral partner to the automotive, consumer, industrial, and retail sectors, APL Logistics orchestrates orders from origin to destination through dedicated account teams, digital tools, and a worldwide network. Part of the Kintetsu World Express (KWE) Group, the company supports customers in Europe from established offices in France, the United Kingdom, Germany, and the Netherlands.

The research was commissioned to better understand how European supply chain leaders are experiencing and managing disruption. The findings are published to give practitioners a clearer picture of how their challenges, tools, and strategies compare with those of their peers across the region.

Get in touch

This survey identified a consistent gap between risk management investment and risk management outcomes across European supply chains. If these findings raise questions about your own operation, our European supply chain team would welcome the conversation.

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