



# How Could This Crisis Impact My Supply Chain

Webcast, March 2022



# Our panelists today



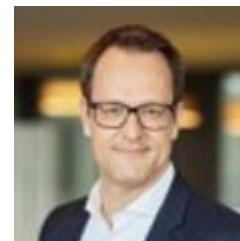
**Björn Asmussen**  
Head of Procurement  
Danfoss



**Joerg Hofstetter**  
Associate Professor  
KEDGE Business  
School



**Harald Nitschinger**  
Co-Founder &  
Managing Director  
Prewave



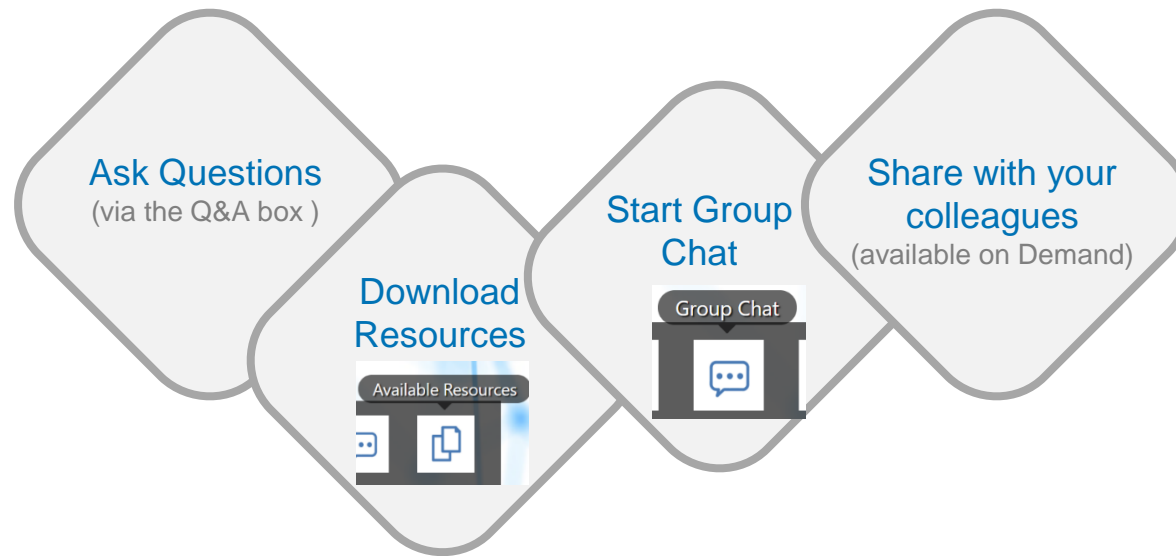
**Gunnar Büchter**  
Executive Director  
Procurement and  
Strategy  
Yanfeng



**Dr Uwe G. Schulte** (Moderator)  
Senior Advisor  
The Conference Board



## Making the most of the webcast

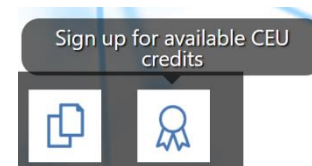


Tell us about your experience to help us improve our future program

## Earn Credits

### CPE (NASBA)

- ✓ Click the link in the **CEU Request Widget** to sign up for credit
- ✓ Stay online for the entire webcast
- ✓ Click 'ok' for 3 popups that occur during the program
- ✓ Credit available for participation in live webcast only



# Introduction

# Current Situation

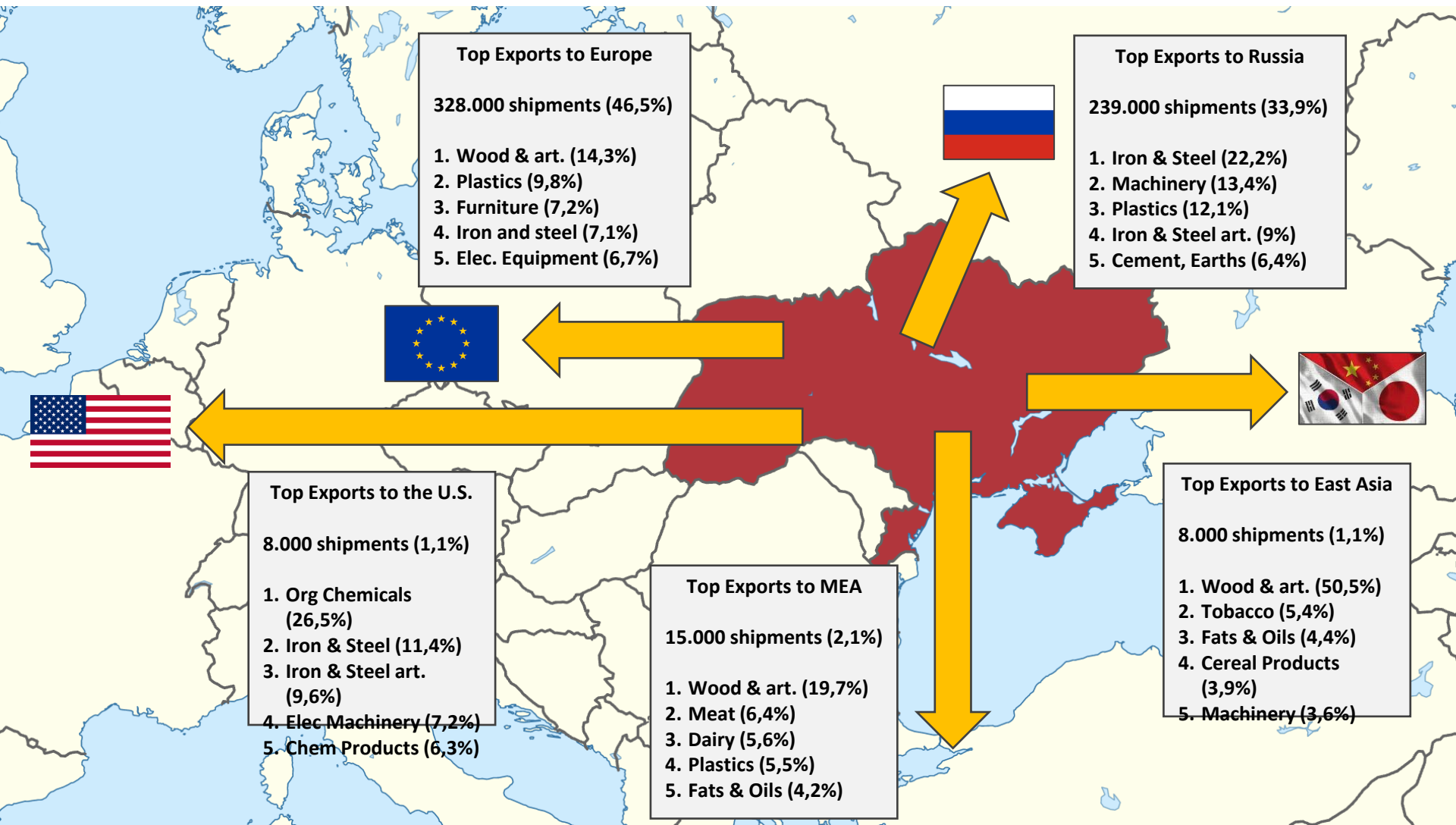
## Poll:

What do you consider current major Supply Chain challenges? (multiple answers possible)

- Safety of staff
- Cost
- Lack of key materials
- Energy supply
- Logistic Capacities
- Relocation of Manufacturing
- Drastic Demand Changes
- Regulation / Sanctions
- Others

Source: The Conference Board/Bloomberg, 2020.





**Top Exports to Europe**  
 328.000 shipments (46,5%)

1. Wood & art. (14,3%)
2. Plastics (9,8%)
3. Furniture (7,2%)
4. Iron and steel (7,1%)
5. Elec. Equipment (6,7%)

**Top Exports to Russia**  
 239.000 shipments (33,9%)

1. Iron & Steel (22,2%)
2. Machinery (13,4%)
3. Plastics (12,1%)
4. Iron & Steel art. (9%)
5. Cement, Earths (6,4%)

**Top Exports to the U.S.**  
 8.000 shipments (1,1%)

1. Org Chemicals (26,5%)
2. Iron & Steel (11,4%)
3. Iron & Steel art. (9,6%)
4. Elec Machinery (7,2%)
5. Chem Products (6,3%)

**Top Exports to MEA**  
 15.000 shipments (2,1%)

1. Wood & art. (19,7%)
2. Meat (6,4%)
3. Dairy (5,6%)
4. Plastics (5,5%)
5. Fats & Oils (4,2%)

**Top Exports to East Asia**  
 8.000 shipments (1,1%)

1. Wood & art. (50,5%)
2. Tobacco (5,4%)
3. Fats & Oils (4,4%)
4. Cereal Products (3,9%)
5. Machinery (3,6%)



## Top Ukrainian Exporters and European Importers



*Exporters*



*Importers*

**Iron and Steel  
(and articles)**

ArcelorMittal Kryvyi Rih ("Kryvorizhstal") (6 MT)  
 Illich Steel and Iron Works (5 MT)  
 Metinvest Zaporizhstal (4.5 MT)



Thyssenkrupp Materials, Can Pack, Arcelormittal  
 Aptiv, Jabil, SKF  
 Audi, BMW

**Iron Ores, Slag**

ArcelorMittal Kryvyi Rih Mine  
 Pivdennyi Mine  
 Pat Ingulec'kij Girnico Mine



Voestalpine Stahl, HBIS Serbia Iron & Steel  
 US Steel Kosice, Arcelormittal Poland

**Paper and  
Paperboard**

Procter & Gamble Ukraina (4435)  
 Bader Ukraina (362)  
 Can Pack Ukraina (262)



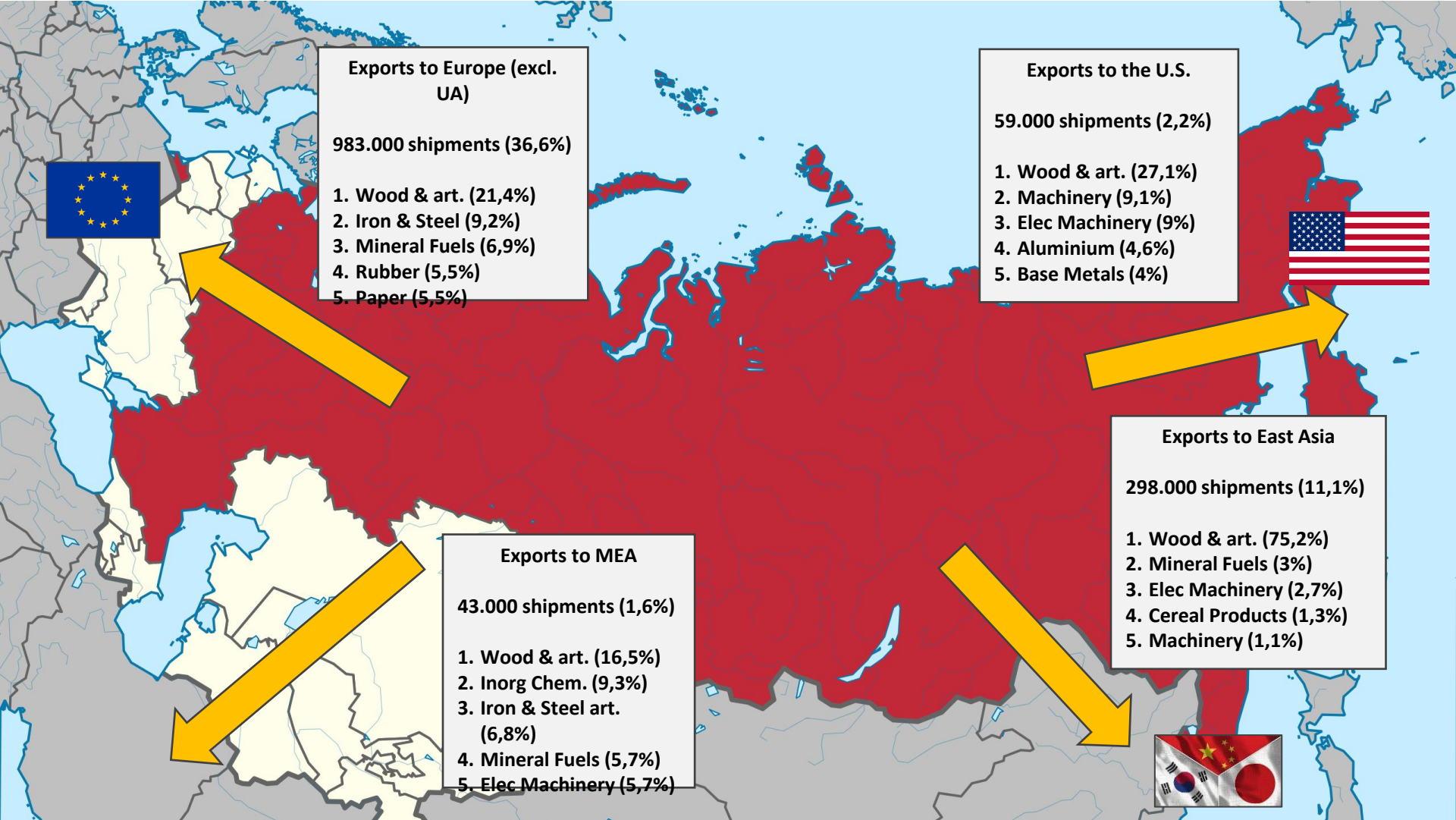
P&G Polska, Jabil,  
 Bader Polska Can-Pack, Interpack,  
 Saint Gobain Construction

**Electrical  
equipment**

Jabil (3358)  
 Leoni (1588)  
 Flextronics (1225)  
 Fujikura Automotive (535), Kostal (525)  
 Kromberg & Schubert (513)



Volkswagen, Porsche, Audi,  
 Lear, Aptiv, SE Bordnetze,  
 Yazaki Wiring, TE Connectivity



### Top Russian Exporters and European Importers



Exporters



Importers

**Wood  
(and articles)**

Egger, Mayr Melnhof, Stora Enso,  
UPM, OOO Stod,  
Ikea



Stora Enso, Matsä, UPM  
Woodbrigde, Egger,  
IKEA

**Rubber  
(and articles)**

Pirelli, Nokian, Michelin  
Synthet-Kauchuk JSC,  
Sibur PJSC "Nizhnekamskneftekhim"



Nokian Tyres (FI), Continental (DE),  
Michelin (PL), Pirelli,  
Goodyear, Bridgestone

**Paper and  
Paperboard**

Gruppa Ilim  
Mondi  
Karelia Pulp



Ilim SA  
Mondi  
Essity

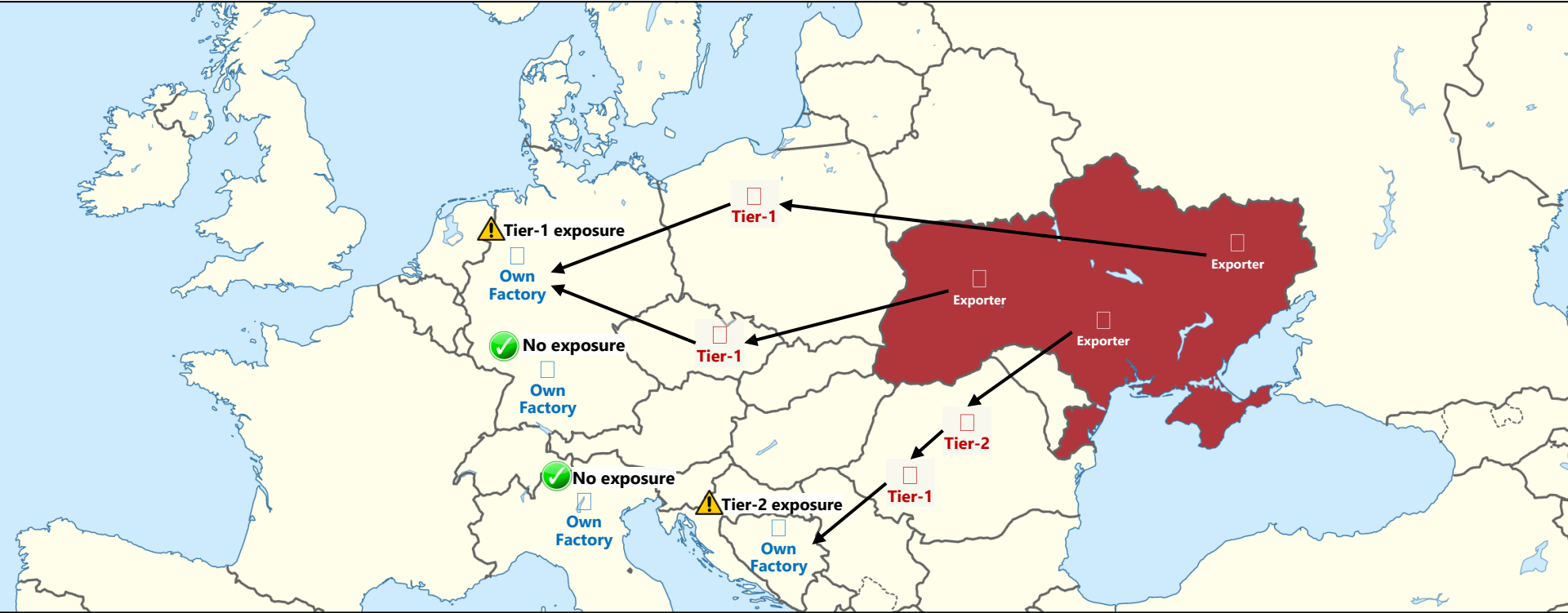
**Machinery,  
Mechanical Parts**

Samsung Electronics, Aeroflot,  
Caterpillar, Liebherr, Bosch Power Tools  
Indesit, Beko, BSH, Whirlpool



Lufthansa Technik,  
Caterpillar, Robert Bosch Powertools,  
Dacia

# Supply Chain Exposure Analysis



Medium / Long-term Development

## Poll:

What do you consider the major Supply Chain challenges in the medium / long-term ?(multiple answers possible)

- Cost
- Disruptions
- Energy Transition
- Geopolitics / Trade barriers
- Pollution
- Human Rights
- Digital Transformation
- Regulation
- Others

Source: The Conference Board/Bloomberg, 2020.





Upcoming webcasts

Thursday, 21<sup>st</sup> April  
09:00 AM ET [09:00] (New York), 03:00 PM CET [15:00] (Brussels),  
09:00 PM SGT [21:00]

**The role of carbon offsets in the pathway to net-zero**

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As the war in Ukraine continues, turn to The Conference Board for daily insights and guidance on what the latest developments mean for you and your company.

[www.conference-board.org/topics/geopolitics](http://www.conference-board.org/topics/geopolitics)

The screenshot displays the 'Geopolitics Hub' page on The Conference Board website. The header includes the site's logo and navigation links for 'US', 'EUROPE', 'ASIA', 'CHINA', and 'GULF'. A search bar and 'myTCB' profile icon are in the top right. The main banner features a satellite view of Earth with the text 'GEOPOLITICS War in Ukraine: Insights and Guidance for You and Your Company'. Below the banner, the 'GEOPOLITICS HUB' section includes a paragraph: 'Geopolitical events are a key driver of economic and business decisions. Here you can find a 360° view of geopolitical crises, starting with the Russo-Ukrainian war, and insights for what's ahead. New resources are being added regularly to help you lead with confidence.' This section is supported by five icons representing 'Economic Impacts', 'ESG Leadership', 'Human Capital Implications', 'Operations & Cybersecurity', and 'Risk, Strategy & Policy'. A 'PUBLICATIONS' carousel below shows four featured articles with their respective images and titles: 'Leading Through the War in Ukraine: Actions for Companies in Asia', 'Will the War in Ukraine Lead to Recession?', 'Cutting Ties With Russia: A Guide to Decision-Making Now and in the Future', and 'Real Leadership in a Crisis'.



# Let's Talk Sustainable Business

The Let's Talk Sustainable Business' podcast series is aimed at people interested in how corporations can drive sustainable development by integrating sustainability into their overall business strategy and managing for positive impact. The series features conversations with experts and practitioners in the field of sustainability.

Access all episodes at  
[conference-board.org/podcasts](https://www.conference-board.org/podcasts)

