



Illumination

GUIDING SUPPLY CHAINS INTO THE FUTURE

2025



With insights from industry experts,
Paul Rossi, Adam Bartlett, and Rick Freeman

resilinc | Annual Report

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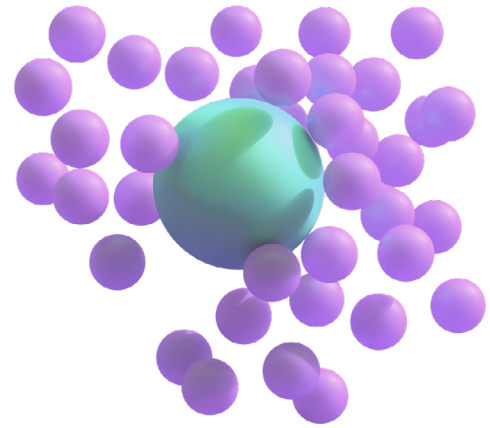
A photograph of a vast lavender field in bloom, stretching towards a horizon under a soft, purple and pink sunset sky. The field is densely packed with tall, purple flower stalks. Overlaid on the image are two large, semi-transparent, light-colored diamond shapes that intersect in the center. The text 'Executive Summary' is centered within these diamonds in a white, sans-serif font.

Executive Summary

01

Section 1.1 - 1.2

Moving forward, together. Shaping tomorrow, today.



The operating environment in 2025

Looking back on 2025, it was a year of change for both global supply chains and Resilinc as a company. After several years of compounding volatility, disruption did not cool off in 2025—instead, it accelerated and diversified. According to [Resilinc EventWatch^{AI}](#) data, overall disruption notifications rose 38% YoY, reinforcing that instability is no longer episodic; it is increasingly structural.

While no supply chain is risk free, 2025 made it especially clear that risk is being shaped by forces well beyond the four walls of the enterprise. Regulatory shifts and enforcement pressure, cyber threats, geopolitical tension, labor disruption, supplier financial strain, and climate-related events all intensified in ways that repeatedly reset planning assumptions and will continue to influence supply chain risk management in 2026 and beyond.

How organizations responded

Despite these risk events, our customers continued to effectively and proactively mitigate supply chain disruptions. By investing in best-in-class resiliency principles, mapping supply chains down to the part-site level, validating supplier intelligence, and monitoring for disruption signals around the clock, these organizations rose above reactive triage. They acted faster, made more informed decisions, protected continuity of supply, and recovered sooner, turning resilience into a measurable competitive advantage.

“Resilience is becoming marketable: resilient brands won’t just promise reliability, they’ll predict it. In 2026, the leaders will turn disruption foresight into a measurable brand asset, and replace data hoarding with AI-enabled collaboration.”



Kamal Ahluwalia
CEO, Resilinc

Section 1.3

Resilinc's evolution and execution in 2025

2025 marked a pivotal leadership transition for Resilinc. We entered a new chapter with seasoned AI and enterprise software leader [Kamal Ahluwalia](#) appointed as Chief Executive Officer. Under this leadership, Resilinc sharpened its focus on applying AI to operational decision-making at scale, aligning the organization around a more autonomous, execution-oriented approach to supply chain risk management.

Over the past year, Resilinc fundamentally re-architected its platform around agentic execution. We introduced [specialized AI agents](#) that translate early risk signals into coordinated, prioritized actions across teams, suppliers, and workflows. In a year when disruption was driven as much by policy shifts, geopolitical volatility, and infrastructure constraints as by operational events, agentic AI became the practical bridge between detection and decision-making.

In parallel, we advanced a critical innovation that turns supply chain risk from abstract exposure into measurable business impact through material-level intelligence. By breaking finished products down into their underlying materials, components, and sub-tier dependencies, Resilinc enables organizations to see exactly where disruptions or regulatory actions will interrupt material flow—and to quickly quantify the revenue at risk. This shifts risk visibility into financial clarity, allowing leaders to rapidly prioritize mitigation based on what will most directly affect production continuity, customer



Resilinc Named a Leader by Gartner® in the 2025 Magic Quadrant™

commitments, and topline performance.

Our momentum in 2025 was matched by meaningful external recognition. Resilinc was named a Leader in the inaugural [2025 Gartner® Magic Quadrant™ for Supplier Risk Management Solutions](#), reflecting the growing importance of supplier risk management and the expectation that these platforms support not only insight but action. As Kamal Ahluwalia put it, this recognition is “not just acknowledgement of our platform—it’s validation of our vision.”

That validation was reflected in continued customer adoption and engagement. In 2025, we continued to expand our work with global organizations across industries such as automotive, high-tech, life sciences, healthcare, and industrial manufacturing—where complexity, regulatory pressure, and multi-tier dependency make supply chain stability especially critical.

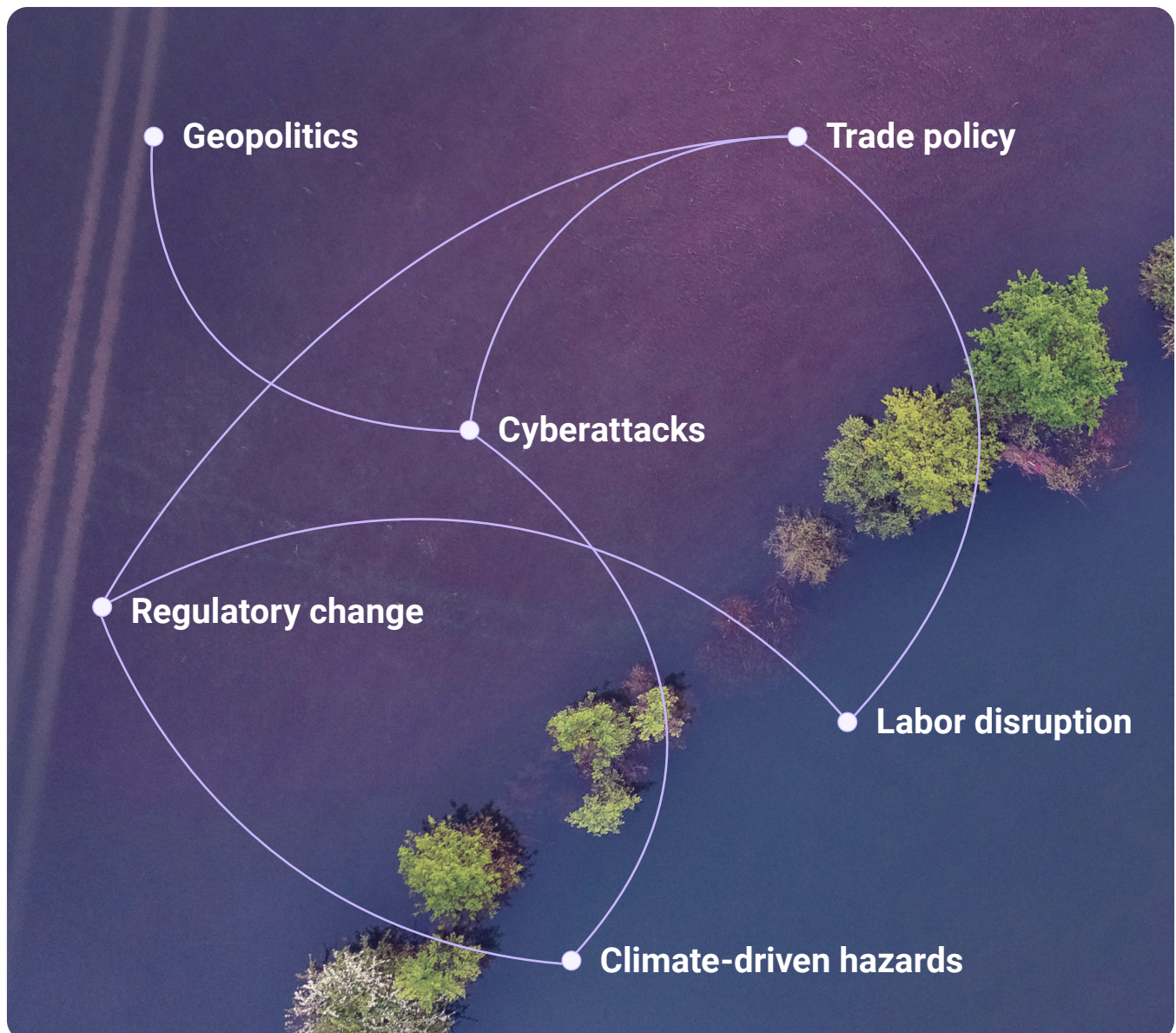
We also celebrated customers and suppliers whose risk and resiliency programs were truly next level. Our [Top 30 Most Resilient Suppliers in the High-Tech Industry for 2025](#) recognition highlighted companies with standout performance in Resilinc’s R Score® assessment, reflecting strengths across dimensions such as network visibility, transparency, business-continuity readiness, and the ability to respond rapidly during disruptions.

Section 1.4

Looking ahead

The volatility that shaped 2025 is unlikely to disappear. Companies should continue to prepare for ongoing risk areas including geopolitics, shifting trade policy, cyberattacks, regulatory change, climate-driven hazards, and labor disruption—megatrends that are increasingly intertwined across global networks. Organizations that invest in AI-powered disruption monitoring, autonomous mapping, and operational risk management capabilities will be best positioned to protect continuity of supply and outperform through uncertainty.

From all of us at Resilinc, thank you for reading our 2025 annual supply chain report.



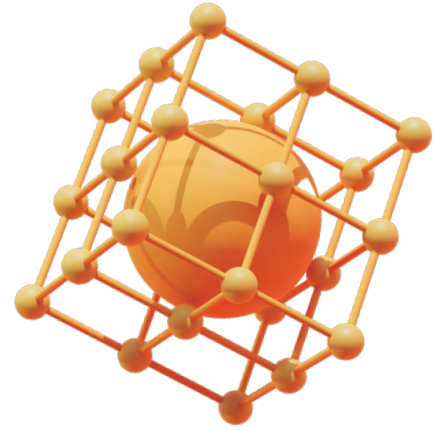


EventWatch^{AI} Data & Analysis

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Section 2.1

EventWatch^{AI} data and analysis



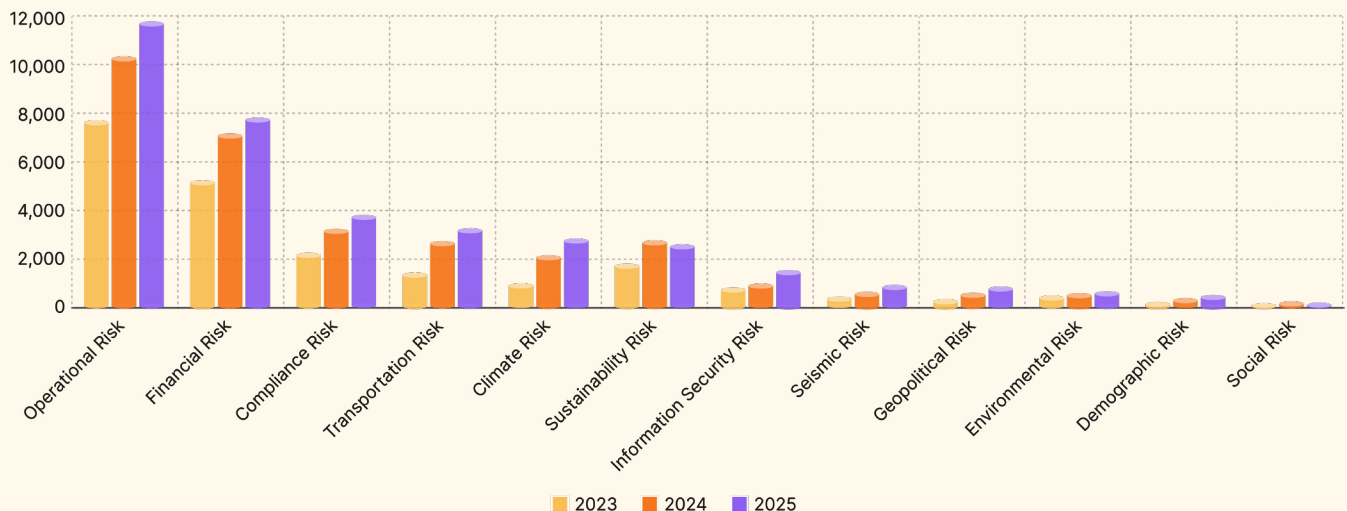
2025 disruption landscape

2025 was a year of renewed acceleration in supply chain disruption that was less defined by a single headline crisis and more by a steady drumbeat of events that repeatedly reset planning assumptions. The scale matters, but so does the character of the disruption. Many of the pressures supply chain teams managed in 2025 were shaped by forces outside the four walls of the enterprise—trade policy, enforcement, infrastructure limits, and geopolitical uncertainty that make volatility feel both more frequent and harder to plan around.

In this report, Resilinc analyzes trends from 2025 data captured by [EventWatch^{AI}](#)—our 24/7 disruption sensing platform monitoring 104 million sources across 108 languages for events that could impact suppliers and supply chains. Signals are contextualized and prioritized using relevance and severity analytics so teams can focus on what matters most.

As shown below in Figure 1, in 2025, EventWatch^{AI} issued 26,225 disruption alerts (up 38% YoY), and the highest-priority risks were escalated for coordinated evaluation and response.

Figure 1: EventWatch^{AI} news (by risk categories)



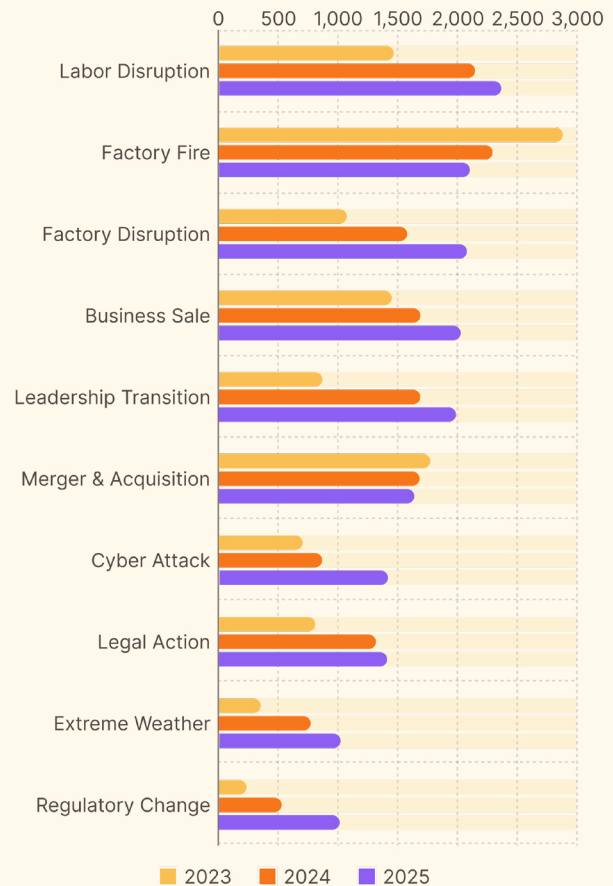
Section 2.2

Supplier financial stress and corporate churn remained elevated

In 2025, financial stress continued to surface across global supplier ecosystems, even as conditions varied widely by region and industry. Higher borrowing costs, uneven demand, and ongoing cost pressure created an environment where many suppliers had less room to absorb shocks or invest in efficiency. In Resilinc's EventWatch^{AI} data shown in Figure 2, this showed up clearly in the categories that tend to precede real continuity issues: bankruptcy notifications rose 20% YoY, profit warnings rose 50%, and corporate restructuring rose 31%. These are not abstract financial headlines; when they occur within critical tiers of a supply network, they can translate quickly into delayed shipments, constrained capacity, deferred maintenance, quality slippage, or sudden changes in terms and service levels.

Corporate change signals also reinforced how frequently supplier risk is tied to organizational shifts rather than physical disruption. Business sale notifications increased 20% YoY, and leadership transitions increased 18%, indicating continued portfolio reshaping and executive churn across many supplier segments. These events can affect supply chains in significant ways, but the impact often emerges over time as new owners or leaders pursue

Figure 2: Top 10 EventWatch^{AI} news alerts (by risk area)



consolidation, product mix changes, footprint rationalization, or policy shifts that alter how customers are served. Mergers and acquisitions declined 3% YoY, but activity remained elevated enough to require close monitoring, especially for suppliers tied to regulated products, long qualification cycles, or solesource components.

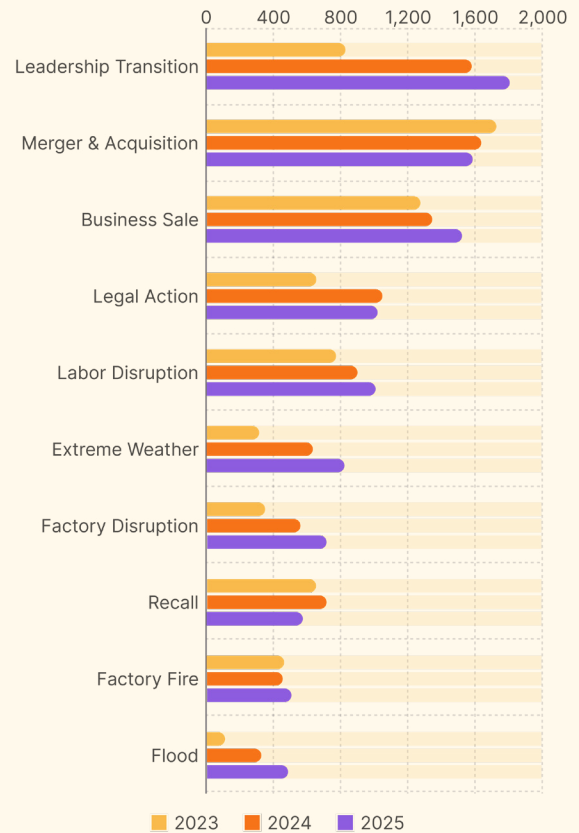
Section 2.3

How Resilinc helps

Rather than treating EventWatch^{AI} signals as after-the-fact explanations, Resilinc operationalizes them as early, actionable indicators of emerging risk across both the physical and corporate dimensions of the supply chain. EventWatch^{AI} continuously detects and contextualizes a broad range of disruption signals, including corporate change events (bankruptcies, restructurings, profit warnings, ownership changes), site-level operational risks (weather events, labor actions, port strikes, infrastructure outages), and geopolitical or regulatory developments—against mapped supplier relationships, production sites, revenue-critical products, and tier-level dependencies (see Figure 3).

This multi-layered context enables teams to assess not only whether an event has occurred, but how it may impact continuity of supply. Site-level events highlight risks to production or logistics, while enterprise-level corporate events surface broader concerns related to financial stability, service levels, or change-of-control implications.

Figure 3: Top 10 WarRooms (by risk area)



By correlating these signals with sole-source exposure and critical part flows, teams can prioritize attention where risk is most likely to propagate downstream.



Disruption Agent

The [Disruption Agent](#) builds on EventWatch^{AI} by acting as an orchestration layer across alerts, notifications, and war rooms. Through a conversational chat interface, it synthesizes signals across sites, suppliers, and parent entities into decision-ready context, and surfaces relevant playbooks, next-best actions, and mitigation guidance. This helps teams navigate validation steps, supplier engagement considerations, and response options more efficiently, enabling earlier, more informed intervention and reducing the likelihood of surprise disruption.



Section 2.4

Corporate change as a disruption driver

In Figure 4, EventWatch^{AI} data shows that human-caused events continued to drive the majority of disruption signals in 2025. Human-caused notifications rose 13% from 2024 to 2025. Naturally caused notifications grew faster, climbing 44% YoY but remained a much smaller share of total alerts.

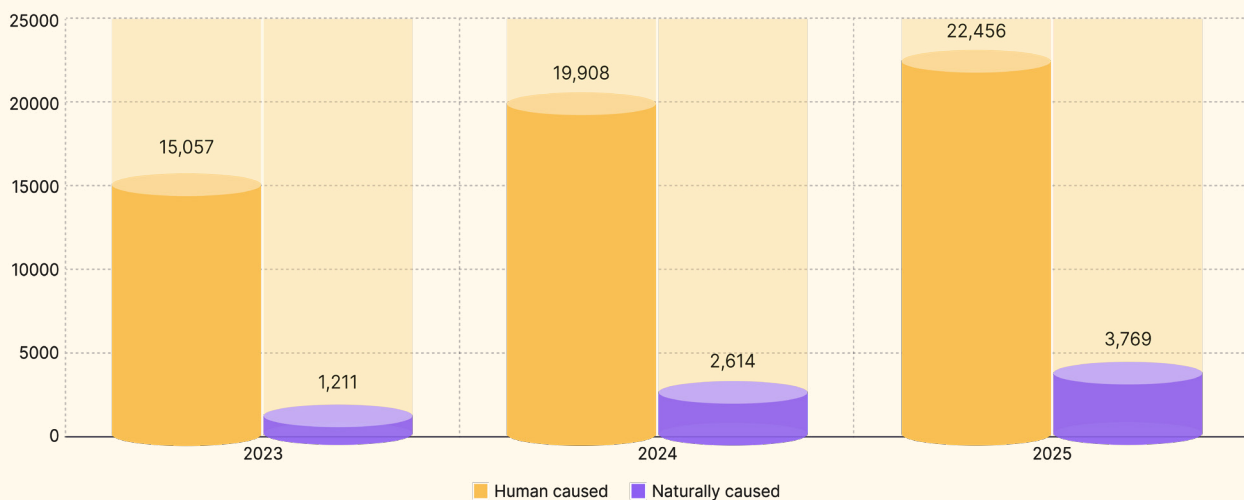
Resilinc analysts see this as the signature risk pattern of 2025: disruption was still largely shaped by human decisions and operating conditions, even while natural hazards intensified. A key contributor was business volatility, which surfaced in WarRoom rankings through frequent escalations tied to business sales, leadership transitions, and merger and

acquisition activity. Frequency of these event types often introduce supplier uncertainty, changes in priorities, shifts in capacity commitments, and delays in decision-making that can quickly become operational risk.

At the same time, the faster rise in naturally caused alerts reflects how exposed global supply chains remain when weather and geophysical events hit already-tight networks. In 2025, the takeaway wasn't that natural risk replaced human risk, it is that natural disruptions increasingly landed on top of an already high baseline of human-driven instability.

Figure 4: Human caused vs naturally caused

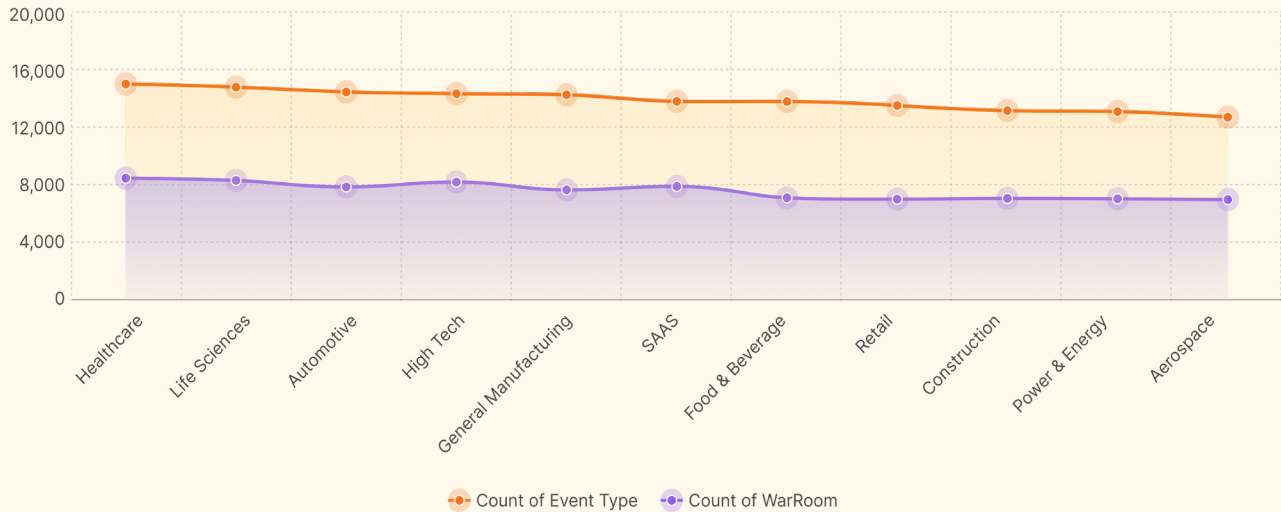
Human-caused events continued to drive the majority of disruption signals in 2025.



Section 2.5

Figure 5: Top 10 most impacted industries

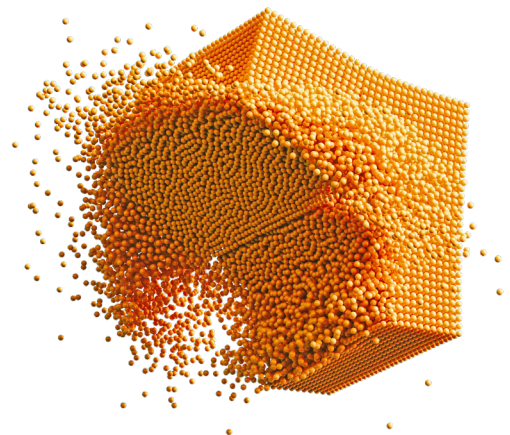
Healthcare and Life Sciences, followed by Automotive and High Tech are consistently the most impacted



Health and safety enforcement actions rose

EventWatch^{AI} continues to capture a meaningful volume of enforcement-driven disruption signals—fines, warning letters, citations, and similar actions—where the root cause is often human-driven noncompliance rather than naturally caused disruption. In 2025, the industry's most consistently impacted by these types of alerts were Healthcare and Life Sciences, followed by Automotive and High Tech (see Figure 5). Notably, the pattern holds across both overall EventWatch^{AI} alert volume and the subset that escalates into WarRooms, indicating that regulated industries are not only seeing more enforcement-related signals, but also generating a significant share of the cases

that require coordinated response. Resilinc analysts view this as consistent with continued normalization of inspection and oversight intensity compared with the pandemic period—where remote audit practices created different enforcement dynamics—and with the growing complexity of compliance obligations across multi-tier supply networks.



Section 2.6

Labor volatility takes the top spot

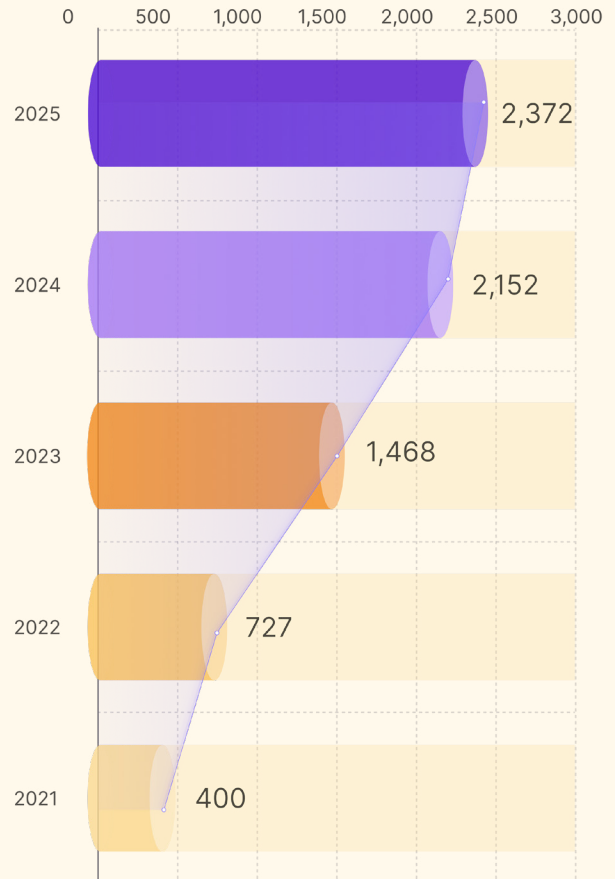
Labor disruption has been a persistent risk category in EventWatch^{AI} data for several years. But in 2025 it moved into the #1 position (see Figure 6), becoming the most frequently reported disruptive event type tracked by Resilinc EventWatch^{AI}. That shift is notable because factory fires held the top spot for the prior four years.

In 2025 Resilinc issued over 2,300 labor disruption alerts, a 10% YoY increase, making labor volatility the most consistent source of operational disruption by volume. While the growth rate was more modest than some of the spikes seen in earlier years, the overall scale signals how quickly workforce instability can translate into missed production targets, delayed shipments, and reduced network flexibility.

As in prior years, the drivers of labor-management friction in 2025 were tied to cost pressures and shifting workplace expectations. Wage and benefit negotiations remained contentious across many regions as workers sought to protect purchasing power and employers managed higher operating costs amid uneven demand signals. Labor actions were not confined to any single country or industry. Disruptions involving transportation and logistics workforces were especially consequential, because even short interruptions can ripple quickly through lead times and service reliability.

At the same time, EventWatch^{AI} notifications tied to labor violations moved in the

Figure 6: Labor disruption



opposite direction. Labor violation alerts declined 41% YoY in 2025. This category includes complaints from workers and advocacy groups as well as government actions and enforcement activity. A decline in alerts does not necessarily mean the underlying risk has disappeared; it may reflect changes in reporting patterns or enforcement visibility relative to 2024, even as labor disruption remained elevated and operationally significant.

Section 2.7

Top 5 supply chain risks drilldown

Event Type	2023	2024	2025
	Factory Fire	Factory Fire	Labor Disruption
	Merger and Acquisition	Labor Disruption	Factory Fire
	Labor Disruption	Business Sale	Factory Disruption
	Business Sale	Leadership Transition	Business Sale
	Factory Disruption	Merger and Acquisition	Leadership Transition

Region	2023	2024	2025
	North America	North America	North America
	Europe	Europe	Europe
	Asia	Asia	Asia
	South America	Global	Global
	Oceania	Oceania	Africa

Industry Alerts	2023	2024	2025
	Life Sciences	Life Sciences	Healthcare
	Healthcare	Healthcare	Life Sciences
	General Manufacturing	General Manufacturing	Automotive
	High Tech	High Tech	High Tech
	Automotive	Automotive	General Manufacturing

Month	2023	2024	2025
	May	July	March
	October	October	January
	March	August	June
	August	November	February
	April	February	July

Events in 2025

Europe

Event type 6,253

Impact sent 3,362

North America

Event type 10,213

Impact sent 6,305

Africa

Event type 800

Impact sent 336

Asia

Event type 5,333

Impact sent 2,531

South America

Event type 807

Impact sent 391

Oceania

Event type 724

Impact sent 414





Trending Topics

03

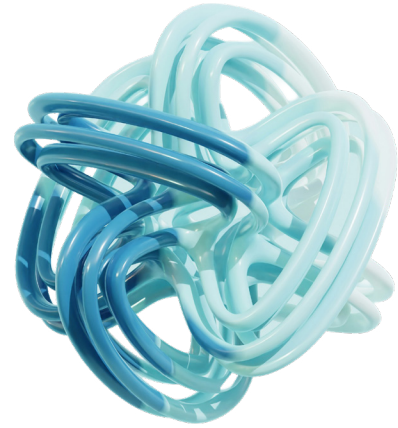
Section 3.1

Trending topics and headlines

Running supply chains in a world that keeps shifting

In 2025, supply chain professionals had fewer chances to operate on “autopilot.” The year was shaped less by isolated shocks and more by external forces that repeatedly reset planning assumptions. Tariffs and shifting trade rules reintroduced uncertainty into sourcing decisions and landed-cost models, while governments played a larger role in supply network design through industrial policy and tighter enforcement. Geopolitical tension continued to pressure logistics reliability, and even when factories were running, supply chains were constrained by the environment around them—policy, corridors, and infrastructure.

Tariffs and shifting trade rules reintroduced uncertainty into sourcing decisions and landed-cost models, while geopolitical instability continued to influence logistics reliability in major corridors. At the same time, the rapid buildout of AI infrastructure introduced a new constraint that supply chains can’t simply route around: power availability. The year reinforced that resilience is increasingly shaped by forces outside the four walls of the enterprise—policy, geopolitics, and infrastructure—rather than by operational execution alone.



National priorities became even more tightly linked to capacity decisions in critical industries, especially semiconductors. U.S. semiconductor policy moved from intent into sustained execution, with the Department of Commerce reporting that the CHIPS Program Office had made 20 awards totaling up to \$33.7B in direct funding and up to \$5.5B in loans¹. Yet as domestic investment advanced, the global chip ecosystem remained shaped by strategic competition and tit-for-tat controls, keeping equipment access, end markets, and critical inputs less predictable than they were a few years ago.

Meanwhile, AI’s data-center buildout made the infrastructure question unavoidable. Reports estimate global data centers will consume about 448 terawatt-hours of electricity in 2025—on the order of a mid-sized country’s annual electricity use—and project that demand will climb sharply by 2030², making energy availability a practical constraint on where computing capacity can be built and how quickly it can scale.

Section 3.2

Automotive and high tech in the policy crosshairs

In 2025, automakers and their suppliers operated in a more policy-exposed environment than in prior years. Trade actions and technology controls shifted the economics, and in some cases the feasibility, of sourcing decisions, while geopolitical tension continued to inject uncertainty into global manufacturing and logistics lanes. Resilinc data reflects a 37% increase in total automotive disruption alerts YoY (see Figure 7). Familiar disruptors such as factory fires

and labor disruption remained persistent, but regulatory change and geopolitical events accounted for a larger share of the disruption mix in 2025 than previous years.

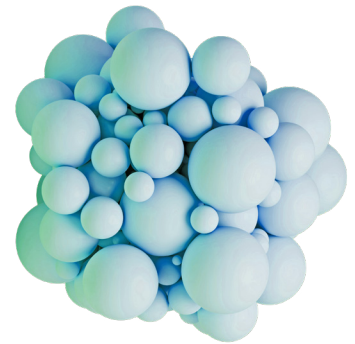
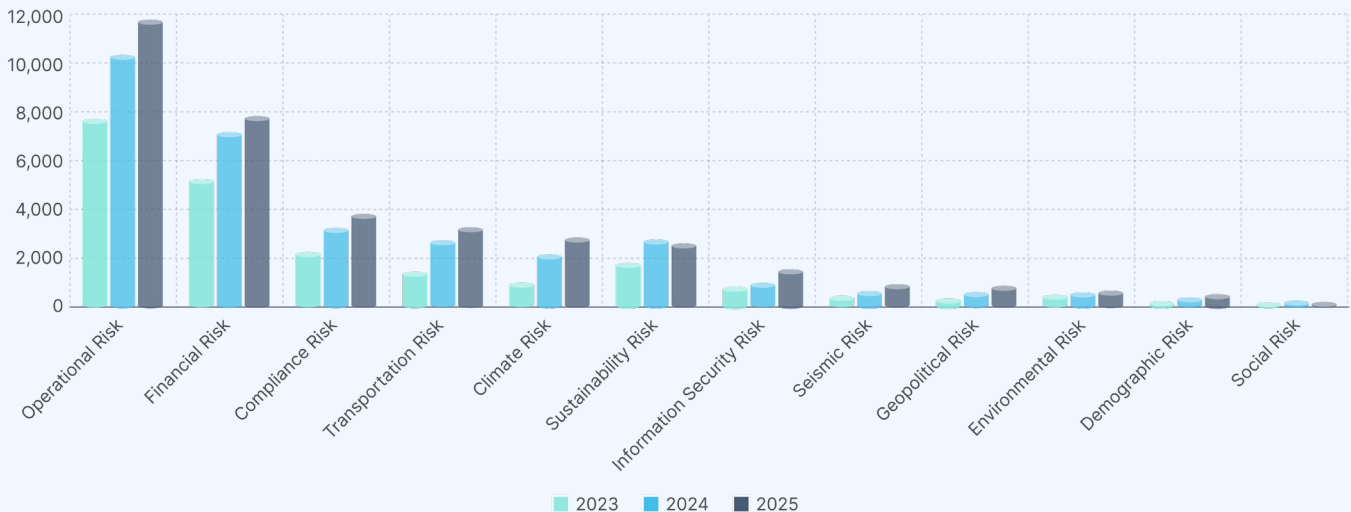


Figure 7: Top 10 disruptions in the automotive industries



Section 3.2

Four policy dynamics help explain the shift:

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Uyghur Forced Labor Prevention Act (UFLPA)

Forced-labor enforcement became a direct execution risk. In 2025, U.S. Customs and Border Protection (CBP) detained 7,186 shipments and denied 5,790; automotive and aerospace accounted for 83% of denials³—turning compliance gaps into immediate holds and downstream delays.

02

Tariffs

Volatility elevated. Congressional Research Service timeline shows shifts the Office of the U.S. Trade Representative (USTR) repeatedly extended Section 301 product exclusions⁴, including 178 exclusions moved from November 29, 2025 to November 10, 2026, complicating cost planning and sourcing.

03

Export Controls

Controls tightened. BIS updated rules and strengthened foundry due diligence, driving supplier requalification⁵.

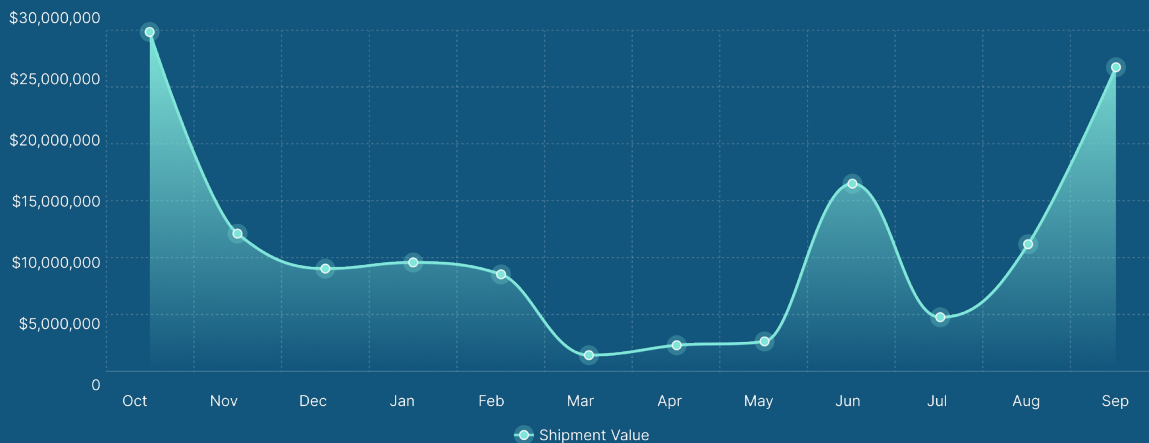
04

Materials

China's controls pushed deeper into inputs. In October 2025, MOFCOM issued export controls on rare earth-related items, including thresholds that can apply even when Chinese-origin rare earths are embedded in products manufactured outside China⁶—adding upstream risk for automotive and high tech.

High tech also showed spikes in information security and demographic risk, reflecting heightened cyber exposure and workforce dynamics.

Figure 8: CBP UFLPA 2025 enforcement statistics
Shipment value (USD) per month



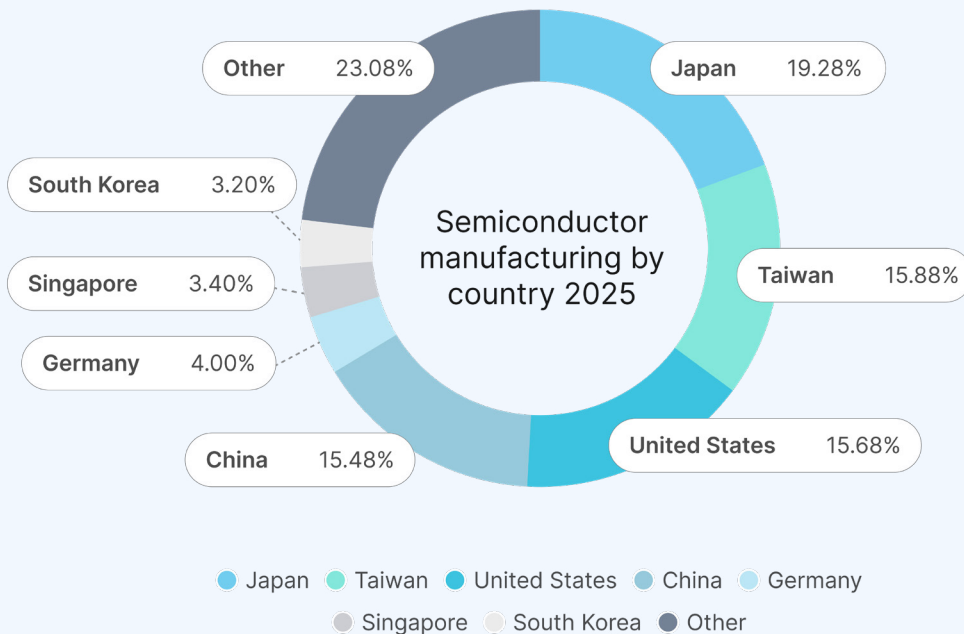
Section 3.3

Shifts in the semiconductor space

Semiconductor dynamics continued to shift in 2025 as governments accelerated domestic capacity amid a more fragmented technology environment (see Figure 9). In the U.S., CHIPS and Science Act execution directed \$39B of the Act’s \$50B at the Department of Commerce toward fab, assembly/test, advanced packaging, R&D, materials, and manufacturing equipment⁷. The CHIPS Program Office’s 2030 goals emphasize expanding leading-edge logic and memory and increasing mature-node output critical to automotive, industrial, and defense supply chains⁸.

Funding followed: the CPO made 20 awards totaling up to \$33.7B in direct funding (plus up to \$5.5B in loans), while the CHIPS R&D Office awarded nearly \$8.3B to operate the National Semiconductor Technology Center and support related research⁹. But 2025 also reinforced limits of a purely domestic buildout—export controls and cross-border governance can still reshape supply flows, as illustrated by the Nexperia (Wingtech-owned) dispute and downstream risk for buyers reliant on legacy chips¹⁰.

Figure 9: Semiconductor manufacturing by country 2025



Section 3.4

Oversight tightens as healthcare supply chains stay fragile

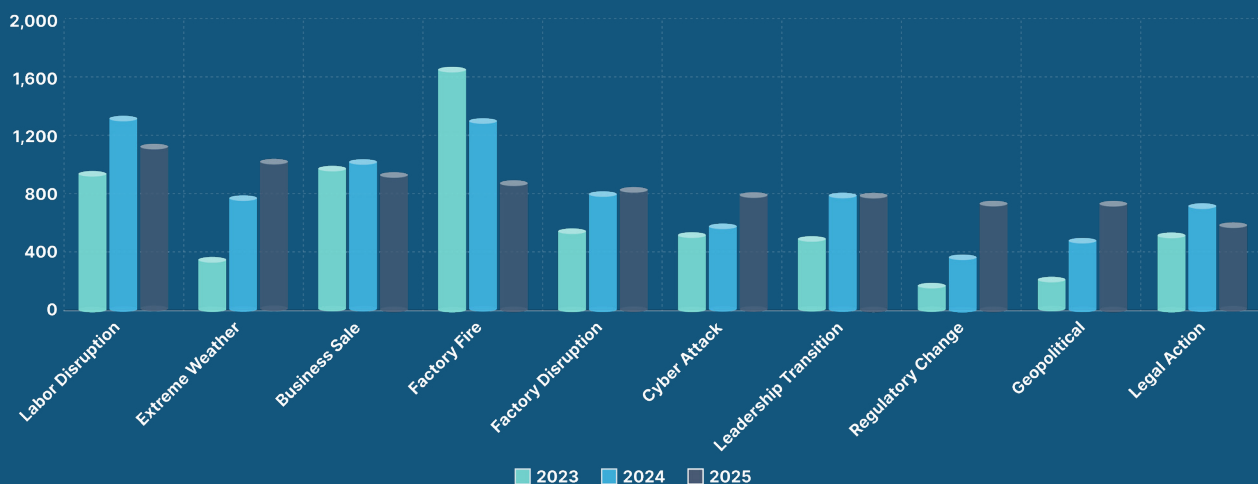
In 2025, [healthcare and life sciences](#) ranked as the most impacted industries. The pattern reflects a basic reality of medical supply chains: strict quality requirements, limited substitutes, and high consequences for delay. When disruption hits, it escalates quickly.

Resilinc's healthcare trends show disruption coming from multiple directions in 2025, with a 35% increase in total healthcare alerts (see Figure 10). Labor disruption remained a consistent driver, while weather events affected transportation and facilities. Business transitions and factory incidents also added volatility that is harder to plan around. Life sciences showed a parallel signal. Operational risk led, pointing to execution pressure inside manufacturing networks where quality systems and continuity are tightly linked.

These developments help explain why disruption stayed elevated:

- In May 2025, the FDA said it would expand unannounced inspections at foreign facilities producing essential medicines. Tighter inspection posture raises the odds that quality gaps turn into remediation work and production delays¹².
- Drug supply fragility remained a system-level issue. A GAO report in April 2025 called for HHS to coordinate activities on drug shortages, reflecting continued vulnerability where manufacturing setbacks can become availability events¹³.
- The FDA also signaled a longer-term push toward resilience. In August 2025 it announced FDA PreCheck to streamline U.S. drug manufacturing capacity, reinforcing that supply stability remains a work in progress.

Figure 10: Top 10 disruptions in healthcare





Resilinc Viewpoints

04

Section 4.1

Resilinc viewpoints

Healthcare supply chains in 2026: from cost optimization to continuity leadership

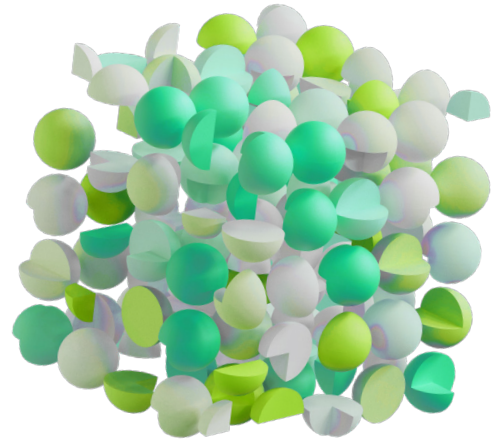


By Adam Bartlett,
Director of Expert Services, Resilinc

As healthcare moves into 2026, supply chain resilience is no longer a back-office efficiency problem—it is a leadership, governance, and patient-care issue. Boards and executive teams are increasingly focused not on whether disruptions occur, but on how quickly organizations can recover, particularly when critical medications, devices, or consumables are at risk.

One of the most visible shifts is how resilience is evaluated. Historically, supply chain performance centered on cost, fill rates, and contract compliance. In 2026, the more telling metrics are speed and stability: how early issues are detected, how fast decisions are made, and how reliably supply is restored. This shift is driving meaningful changes across GPOs, manufacturers, distributors, and care delivery organizations.

GPO contracting is a prime example. The industry is moving away from a pure lowest-price model toward contracts that demand proof of delivery capability. Backup sources, manufacturing origin transparency, surge



capacity, and rapid disruption notification are becoming table stakes. Risk scorecards are increasingly used alongside pricing in award decisions, reflecting the reality that the cheapest supplier is often the most expensive when supply fails.

Visibility expectations are also moving upstream. Knowing direct suppliers is no longer sufficient when the true constraints often sit several tiers back—in API and excipient manufacturing, sterile fill-finish capacity, sterilization services, or packaging. Healthcare organizations are under growing pressure to understand where these bottlenecks exist and how exposed they are to single points of failure tied to one region, one facility, or one supplier relationship.

Distributors are playing a more active role as well. During shortages, they are increasingly expected to act as traffic controllers—enforcing allocation rules, enabling smarter substitutions, and providing real-time visibility into on-hand inventory, inbound shipments, ETAs, and constrained SKUs. This requires

Section 4.1

tighter coordination with manufacturers and health systems, often through shared “war room” processes when disruptions escalate.

At the same time, shortage response itself is becoming more proactive. Rather than reacting when shelves are empty, organizations are using earlier signals—quality deviations, audit findings, weather events, port congestion, geopolitical developments, and demand spikes—to intervene sooner. This evolution reflects a broader convergence of quality and supply risk. In 2026, supplier performance is judged not only by whether a product can be made, but whether it can be made consistently, with quality, reliability, and service levels assessed together.

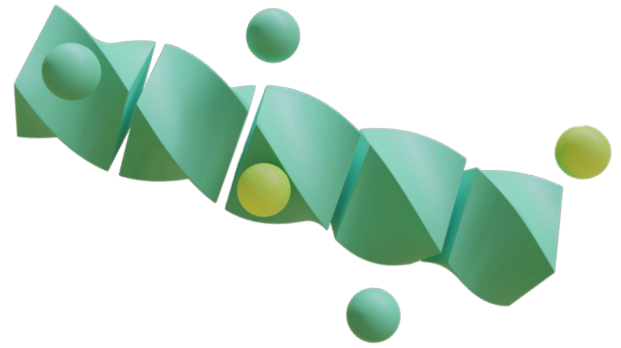
Traceability is also taking on a new role. Beyond recalls, track-and-trace data is increasingly used to manage continuity—supporting substitutions, verifying chain of custody, and enabling smarter allocation when supply tightens. This shift reinforces the need for clean item master data and integrated inventory visibility across pharmacies, operating rooms, and care units.

The path forward is practical and actionable. Healthcare organizations should start by identifying their most critical supplies, often 50 to 200 items that operations simply cannot run without—and mapping the few upstream dependencies that truly matter. From there, simple shortage playbooks clarify who decides substitutions, how communication flows, and what triggers escalation. Manufacturers must quantify where they are fragile and line up alternatives before they are forced to act. Distributors and 3PLs must improve transparency and be explicit about allocation logic so customers can plan effectively.

Ultimately, healthcare supply chains in 2026 will be judged on resilience, not just efficiency. The organizations that succeed will be those that replace reactive firefighting with structured preparedness, measuring how fast they detect problems, how decisively they respond, and how reliably they recover. In an environment of persistent disruption, continuity itself becomes a competitive advantage and a cornerstone of patient care.

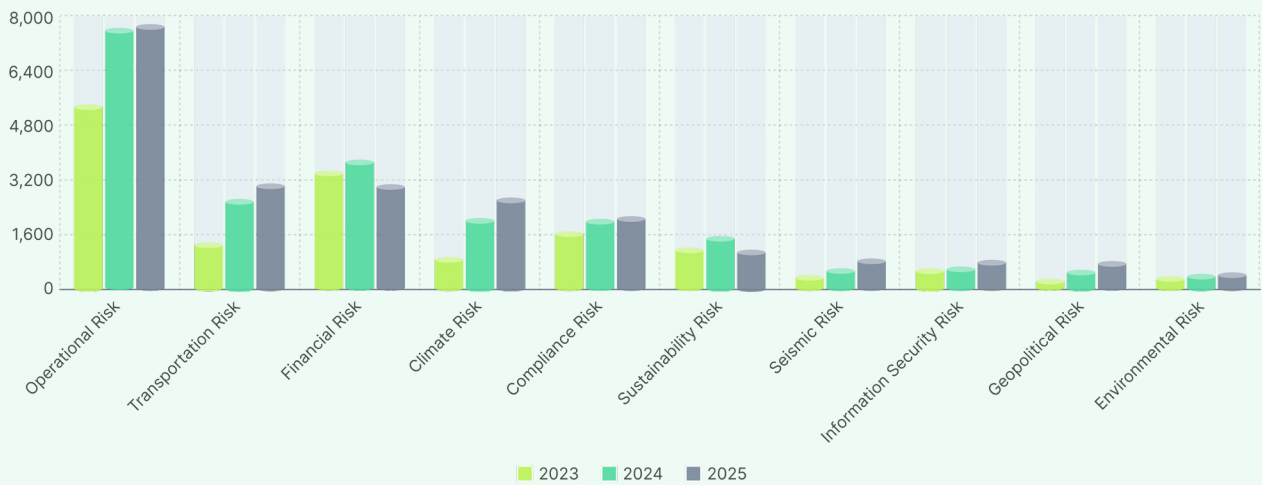
Section 4.2

Life sciences supply chains in 2026: from operational risk to commercialization constraint



By Adam Bartlett,
Director of Expert Services, Resilinc

Figure 11: Life sciences disruptions by risk category



As we move into 2026, life sciences supply chains are entering a fundamentally different risk environment. Instead of being defined solely by shortages or manufacturing outages, disruption is increasingly driven by policy enforcement, documentation gaps, and the inability to prove compliance fast enough to keep product moving (see Figure 11). The organizations that struggle will not necessarily be the least sophisticated manufacturers, but those that fail to operationalize resilience across procurement, quality, and commercialization.

In the United States, the ongoing Section 232 review of pharmaceuticals and APIs keeps

tariff risk firmly on the table. Even without definitive outcomes or timelines, the impact is already being felt. Procurement teams should expect pricing volatility, supplier renegotiations, and pressure on imported intermediates and raw materials—not just finished dose forms. This uncertainty requires companies to build tariff-ready bills of materials that clearly document country of origin, HTS classifications, material value contribution, and qualified alternates for revenue-critical products.

At the same time, forced labor enforcement is becoming more expensive and less forgiving. [UFLPA enforcement](#) continues to

Section 4.2

evolve, with new entities added and broader sector attention, while the EU's Forced Labor Regulation—effective in late 2027—will drive supplier evidence requirements well before enforcement begins. Life sciences companies that wait will find themselves unable to release or import products on time. Good procurement in 2026 means having forced-labor evidence packs ready for high-risk categories, contractually requiring sub-tier transparency, and standing up import defensibility workflows that can respond within 48 hours if a shipment is questioned.

Environmental and sustainability regulations add another layer of friction. While the EU has delayed [EUDR enforcement](#) until December 2026 for larger operators, the practical impact is already rippling upstream. Packaging, inserts, pallets, and paper-based secondary materials can all fall into scope, and suppliers will increasingly push traceability and geolocation requirements back onto manufacturers. Companies need to identify where EUDR touches them indirectly and factor compliance-driven delays into sourcing decisions—because the lowest-cost supplier is no longer the cheapest if documentation stops shipment or release.

Overlaying all of this is a new category of vendor eligibility risk. The BIOSECURE Act, now law in the U.S., and proposed updates to the EU Cybersecurity Act are forcing reassessment of suppliers tied to high-risk jurisdictions or technologies. These policies turn cloud platforms, embedded device components, and connectivity modules into procurement and continuity risks, not just IT concerns. Companies that wait to

address these dependencies may be forced into rapid, disruptive supplier changes under regulatory or customer pressure.

The path forward is clear, even if it is not easy. In 2026, resilience must be designed, measured, and enforced. That means treating sterile fill-finish, cold chain lanes, critical inputs, and quality release throughput as one integrated system. It means removing single points of failure, pre-qualifying alternates before a crisis, locking capacity earlier than feeling comfortable, and putting shared scorecards in place with suppliers and logistics partners.

“The simple play is remove single points of failure, build documented proof for what you buy and where it comes from, and operationalize partner transparency so you can detect, decide, and recover faster than the next disruption.”

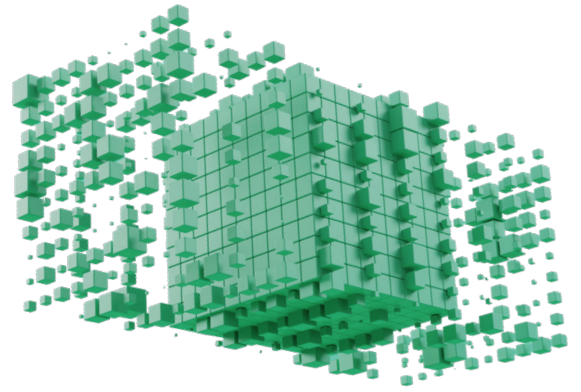
Supply chain resilience shapes outcomes in 2026. It determines whether organizations sustain momentum or fall behind when disruption hits. Companies that [act now](#) will compete on continuity, the rest will pay for it later.

Section 4.3

High-tech supply chains in 2026: navigating constraint, volatility, and scale



By Rick Freeman,
Sr. Director, Expert Services, Resilinc



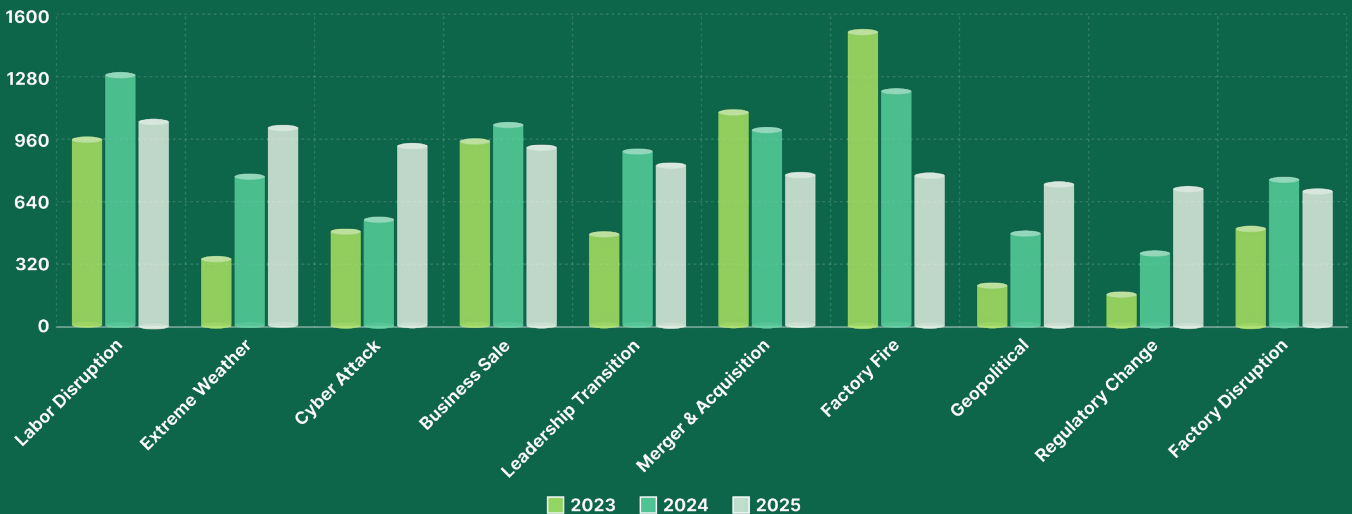
In 2026, high-tech and semiconductor supply chains remain under sustained pressure from AI-driven demand, constrained advanced-node capacity, and ongoing geopolitical fragmentation. Volatility in memory and logic supply is becoming a structural reality—making visibility, diversification, and proactive risk management essential for manufacturers and OEMs.

A key driver is the widening imbalance in high-end memory. DRAM and related shortages are being fueled by AI and data center demand, which continues to absorb a major share of premium output. At the same time, foundry capacity at advanced nodes remains highly

constrained, with production effectively locked in by the largest high-volume customers. That dynamic limits flexibility for everyone else and makes recovery from disruption slower and more expensive.

The ripple effects are already spreading. Memory constraints are expected to begin impacting the automotive sector in the first half of the year, complicating production planning in an industry that depends on stable component availability. Pricing pressure is also building: increases are already in place and are expected to continue, compressing margins for manufacturers and pushing higher costs to end customers.

Figure 12: Top 10 high tech disruptions



Section 4.3

Geopolitical and trade risk adds another persistent layer. With advanced manufacturing still concentrated in East Asia, political posturing, tariff shifts, and export controls are likely to remain frequent. While policy changes can be sudden, many countries also cannot afford to cut off access to chips they cannot yet make—so uncertainty becomes something leaders must plan around, not wait out.

Although governments are investing heavily in domestic semiconductor production, new fabs are still years away from meaningful output. In the nearer term, regional diversification is ramping up, with expanded hubs in places like Vietnam, Thailand, India, and the Middle East. This won't replace advanced-node capacity overnight, but it can reduce single-region exposure and improve long-term resilience. Workforce constraints may also become a gating factor, creating bottlenecks just as companies try to scale and diversify.

Taken together, these forces are shifting what “winning” looks like in high tech. Competitive advantage is moving toward compute efficiency, supply assurance through multi-region and multi-supplier resilience, and the ability to operate credibly with strong compliance and security.

That's why I recommend organizations step back and reassess the fundamentals.

“Now is the time to stop and look at your SCRM function. Review people, process, technology, and governance. Do you have the right technologies to drive the future? Are you building a risk averse culture? Are you riding the wave of chaos, or being tossed about by it?”

This is the next era of high tech: not just building the smartest systems—but building systems that can actually be deployed at scale in a constrained, volatile world.

Section 4.4

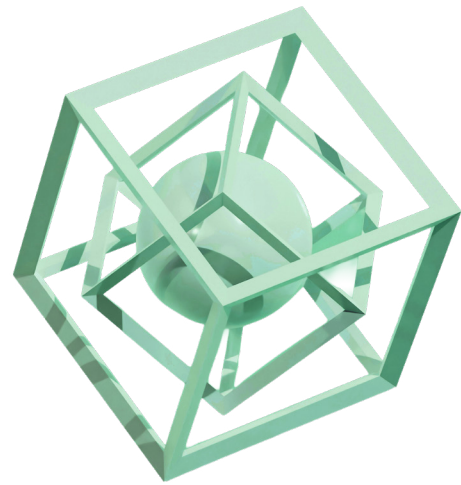
Automotive and manufacturing supply chains in 2026: managing persistent disruption



By Paul Rossi,
*Director, Expert Services –
Automotive and Manufacturing,
Resilinc*

In 2026, the automotive and manufacturing sector should expect a steady stream of disruptions that don't always halt production outright, but gradually reduce throughput and complicate vehicle launches. One of the most persistent pressure points remains semiconductors and electronics, where tight supplies of memory and advanced chips—driven by booming data-center demand—continue to squeeze program timelines and margins. Companies that stay ahead pair clear multi-tier parts visibility with formal agreements tied to key foundries, while also pushing product engineering toward hardware and software designs that can tolerate multiple chip families without costly redesign cycles.

At the same time, rapid trade and regulatory shifts—tariffs, import rules, and forced-labor enforcement—are shortening decision windows and raising compliance costs, making parts lists and origin data operational necessities rather than “nice to have.” Layered on top are chronic operational fragilities from



workforce disruption, extreme weather, and cyber incidents, all of which slow execution if not planned for in advance. Hardening critical sites for power and staffing, running cross-functional drills that assume degraded IT, and qualifying alternate suppliers and logistics lanes are becoming standard practice.

“The winners in 2026 will treat resilience as a strategic capability—combining continuous, multi-tier monitoring, validated supplier network data, resilient product design, and profit center focus.”

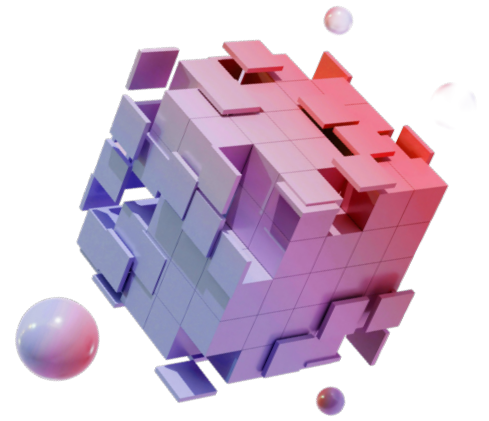


Conclusion

05

Section 5.1

Conclusion



From signals to action: what agentic AI taught us in 2025

2025 made one thing clear: disruptions are arriving more often, cascading deeper into supply networks, and offering less warning. Alert volume rose, but the bigger shift was why disruption happens and where it starts—policy enforcement and compliance actions triggering sub-tier execution issues, recurring labor and localized health events slowing operations, and climate/infrastructure shocks stressing routing, power, and logistics. The result: faster disruption, deeper origin points, and weaker visibility where teams most need it.

That reality exposed the limits of traditional response. Manual triage, siloed decisions, and checklist workflows can't keep pace when remediation windows shrink and the cost of mis-prioritization rises. In response, Resilinc leaned decisively into agentic AI—systems designed not just to detect risk, but to interpret context, prioritize impact, and orchestrate action across complex networks. Key lessons:

- **Disruption starts lower in the stack.** Sub-tier and material-level dependencies often drive the biggest impacts.
- **Prioritization beats raw visibility.** The value is identifying what matters now using context like sole-source exposure, revenue-critical parts, and site constraints.
- **Compliance signals can flip outcomes overnight.** Tariffs, UFLPA, and export controls can turn “available” into “non-deliverable” quickly, requiring evidence-ready response.
- **Human + AI wins.** AI accelerates synthesis and next steps; experts validate, coordinate, and execute with partners.

For 2026, the implications are practical: extend visibility beyond Tier 1, adopt execution-oriented tooling that turns insight into action, and build playbooks assuming policy outcomes can be immediate. The future isn't eliminating uncertainty—it's operationalizing response. Agentic AI helps bridge sensing and doing, combining machine speed with expert judgment to protect continuity and reduce downstream impact.

From all of us at Resilinc: thank you for reading. We built our [agentic capabilities](#) to help you act faster and with more confidence—and we look forward to partnering with teams ready to [stop reacting and start executing](#).

