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10 september 2025

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Managing risks and sustainability as a cornerstone of success in modern supply chains

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SCM & Logistics department
Schaeffler

We pioneer motion

Let's start with some good and bad news...



Source:
<https://www.linkedin.com/feed/update/urn:li:activity:7283399239194316801/>



Source:
<https://www.linkedin.com/feed/update/urn:li:activity:7287365919767449601/>



In 2025 the world is still a volatile and risky place with three top-risks:

- 1) Armed conflicts between states
- 2) Geo-political tensions
- 3) Trade conflicts
- 4) Extreme weather events



We can prepare for the most relevant and impactful by

- ...establishing contingency plans
- ...building up inventory buffers
- ...exploring alternative sources
- ...and working together

Collaboration is key!



Three aspects we will address:

1. *How are **risk management and sustainability** connected?*
2. *Why and how do **SCM and Procurement** need to interact and collaborate?*
3. *How does this **work in practice** at Schaeffler freight management?*

Schaeffler Group – We pioneer motion

The Schaeffler Group has been **driving forward groundbreaking inventions and developments** in the field of motion technology for over 75 years. With **innovative technologies, products, and services** for electric mobility, CO₂-efficient drives, chassis solutions, Industry 4.0, digitalization, and renewable energies, the company is a reliable partner for making motion more efficient, intelligent and sustainable – over the entire life cycle.

The Motion Technology Company manufactures high-precision components and systems for drive train and chassis applications as well as rolling and plain bearing solutions for a large number of industrial applications.



Schaeffler facts and figures – One of the world's largest family-owned companies

~120,000
employees worldwide

>250 locations in
~55 countries

~100 plants and
34 R&D centers

~€18.2 billion
of sales in 2024

4.5%
EBIT margin in 2024¹

>1,000
patents registered in 2024

¹ Before special items

Schaeffler products facilitate and shape mobility – Our customer sectors

TWO-WHEELERS



CARS & LIGHT
COMMERCIAL VEHICLES



TRUCK & BUS



OFF-ROAD



RAIL



AEROSPACE



RAW MATERIALS



INDUSTRIAL AUTOMATION



POWER TRANSMISSION



WIND



The increasing rate of disruptions in global transport supply chains calls for action

A timeline of the B.C. port workers strike over the past five weeks

GLOBE STAFF
PUBLISHED JULY 31, 2023
UPDATED AUGUST 6, 2023



US shippers avoid East Coast ports on risk of second strike

By Lisa Baertlein, Doyinsola Oladipo and Jessica DiNapoli
October 30, 2024 4:59 PM GMT+1 · Updated 6 months ago



How the war in Ukraine impacts global supply chains

The war has strained global supply chains — from semiconductors to car parts. This calls for policies to mitigate disruptions and increase resilience



One dead as Tropical Storm Khanun causes floods, evacuations in S Korea

Some 350 flights and 410 train routes have been cancelled, and more than 10,000 people moved to safety, the interior ministry says.



Focus: Historic drought, hot seas slow Panama Canal shipping

Climate & Energy | Climate Change | Climate Solutions
By Lisa Baertlein and Marianna Parraga
August 21, 2023 1:09 PM GMT+2 · Updated 2 months ago



How can the Israel-Hamas War impact Maritime Shipping and Supply Chains in general?



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Risk management and sustainability: Vicious or virtuous cycle

1

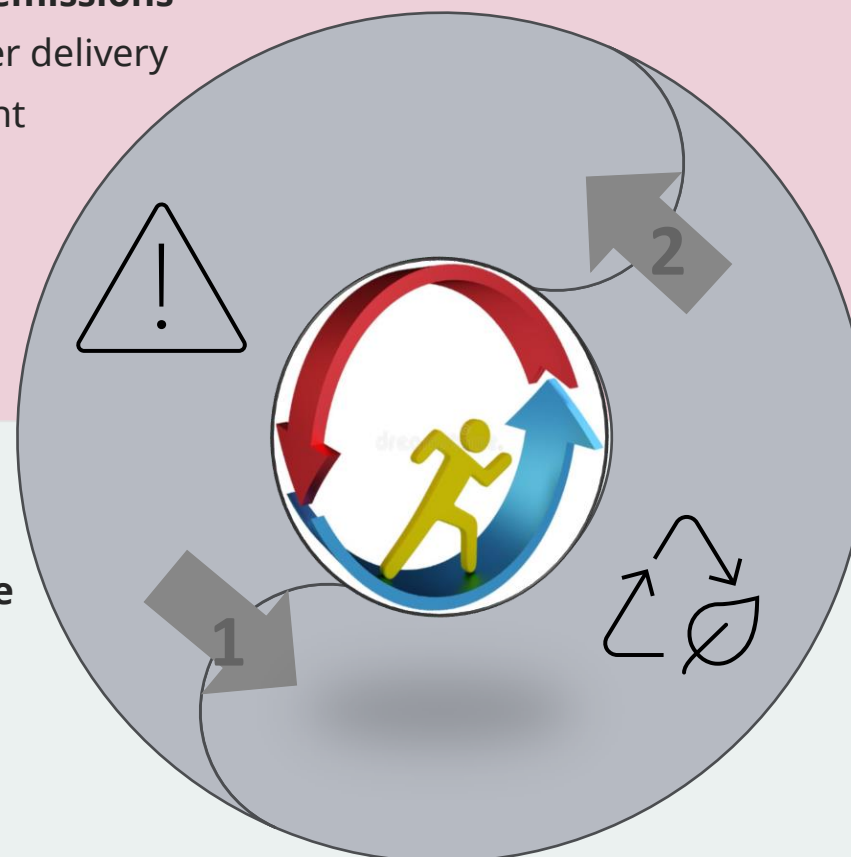
SC disruptions as a driver of CO2 emissions

- SC disruptions endanger customer delivery
- Deliveries are secured by airfreight
- More airfreight → CO2 emissions

2

CO2 emissions as a driver of SC disruptions

- More CO2 emissions accelerate global warming
- Global warming intensifies extreme weather on oceans and continents
- Extreme weather aggravates supply chain disruption



1

Introduce proactive risk management as a lever to turn the vicious cycle into a virtuous cycle



2

Lower emissions as means to ends

- Achieving company climate targets
- Maintaining 1.5-degree goal
- (Hopefully) alleviate SC disruptions

SCM and Procurement are birds of a feather



Survival of the fittest

- Increased Costs and Inefficiencies
- Disrupted Supply Chain Operations
- Suboptimal Supplier/Carrier Relationships
- Dissatisfied customers

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Swarm intelligence

- Enhanced Risk Mitigation & SC Resilience
- Optimized Cost Management
- Better Supplier and Carrier Relationships
- Efficient Communication and Transparency
- Strategic and competitive advantage



Example 1: Blockage of Red Sea/Suez Canal passage due to missile attacks by Huthi rebels



Escalation of Israel-Hamas conflict to Yemen: Huthi rebels supported by Hisbollah and Hamas attack cargo ships passing Bab al-Mandab Strait. Large carriers stop passage of Red Sea and Suez Canal.



Key decisions & measures

- Global cross-functional task force assembled
- December 2023: Instant decision by carriers to re-route via Cape Hope
- January 2024: Airfreight for critical items to bridge transit times of +10 days
- February 2024: Implementation of Northern rail route through Russia
- October 2024: Switch of rail route through Middle corridor to avoid sanctions
- Jan 2025: Full switch to Ocean due to congestions on Middle corridor

Example 2: Threat of shipping disruption because of US East Coast port worker strike



International Longshoremen's Association (ILA) threatened with **strikes in US East coast ports as of 1st October 2024 and 15th January 2025** in case no deal agreement can be reached with employer side USMX.



Key decisions & measures

- Global cross-functional task force assembled
- 1st Oct 2024: no re-routing
 - strike ends after 3 days
 - no major damage
 - express deliveries
- 15th Jan 2025: re-routing in CW51
 - via Montreal and Halifax, CA
 - Added transit time ~7 days
 - Daily alignment calls with region and carriers
 - Daily monitoring and GPS tracking of containers

Focus on value-add for the business!

Concluding advice to managing risks and sustainability as a cornerstone of success in modern supply chains

Know your SCM/ Procurement counterparts

- Gain reciprocal understanding
- Form alliances on management and operational level
- Strategize and act together

Report key KPIS with one voice to the business and top management

- Align KPIs
- Define clear baseline
- Convey consistent message

Excel as SCM / Procurement expert

- Know your stuff!
- Actively manage suppliers/LSPs
- Stick to your commitments

Thank you for your interest and attention!

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Feel free to connect

