

Global Supply Chain Risk & Resilience Study 2026

European Perspective

OVERVIEW

- Thematic focus: “The Economics of Sustainability – From Risk to Value”
- Regional analysis covering all participating European countries
- 394 responses from procurement, sustainability, compliance, and risk management experts
- Part of a global survey with more than 600 respondents
- Additional reports available for the **DACH region** (German only) and the **global results**

Foreword

From ESG Compliance to Supply Chain Resilience: The Next Capability Shift

Resilience has become a boardroom priority. As supply chains face growing geopolitical, environmental and regulatory pressures, organizations are being challenged to improve visibility, anticipate disruption and respond with greater agility.

The findings of this study highlight the exposure. **79%** of participating companies experienced sustainability-related risks in their supply chains with significant financial or operational impact over the past three years. Yet only **10%** have visibility across multiple tiers of their supplier network. The issue is not a lack of awareness. It is a lack of the capabilities required to detect dependencies, interpret risk signals and act before disruption escalates.

This raises an important question, particularly at a time of constrained budgets: must companies choose between meeting sustainability requirements and investing in resilience? Our view is that this is the wrong choice. Compliance and resilience should not be competing agendas. The data, transparency and supplier engagement established for sustainability can become the foundation of broader, forward-looking supply chain capabilities.

However, this requires a change in mindset. Many organizations treat ESG primarily as a dedicated compliance program, supported by separate processes, teams and technology. That approach has helped address regulatory requirements, but it has often left sustainability disconnected from sourcing decisions, operational risk management and business planning. The next step is to integrate these disciplines into a common operating model focused on anticipation, coordinated decision-making and measurable value.

Three shifts are essential:

- **From fragmented data to a trusted supply chain data backbone**, providing visibility into suppliers, facilities, dependencies and risk exposure.
- **From functional silos to an integrated resilience operating model**, connecting procurement, supply chain, sustainability, risk and business operations with suppliers.
- **From reactive monitoring to forward-looking decision support**, using analytics and AI to identify vulnerabilities, anticipate disruption and accelerate action.

This is the essence of future SCM: evolving from fragmented compliance and risk initiatives towards an integrated operating model that enables organizations to sense earlier, decide faster and act with confidence. In doing so, sustainability and resilience become not only safeguards against disruption, but drivers of performance and long-term value creation.



Laurent Charmes
Senior Manager, Supplier Risk Management
BearingPoint

The Results at a Glance

Sustainability-related supply chain risks are no longer an abstract concern for European companies. 79% experienced at least one risk with significant financial or operational impact over the past three years. Regulatory and compliance risks are the most common, but climate, business ethics, and human rights risks also have a material impact.

Many companies have established the foundations for managing these risks. Yet three gaps remain: visibility beyond the first supplier tier, the firm integration of sustainability into a genuinely integrated risk management approach, and systematic measurement of the value created by sustainability efforts.

Visibility remains shallow and shapes resilience

- 60% of companies have no risk insights beyond Tier 1, while only 10% achieve visibility across multiple tiers.
- Only 33% rate their supply chain resilience as (very) high, while 64% rate it as moderate or (very) low.
- Companies with visibility beyond Tier 1 are 1.6 times more likely to report high levels of resilience. Those limited to Tier 1 are 3.3 times more likely to report low resilience.

Integrated risk management improves outcomes

- 42% have integrated sustainability risks into key processes or strategic decision-making. By contrast, 50% still act ad hoc or operate in silos.
- 63% of companies with integrated approaches report clearly attributable business value from their supply chain sustainability measures, compared with 31% of those working ad hoc.
- Foundational practices such as regular risk assessments (53%) are widely used, whereas more forward-looking capabilities are less common. Highly resilient companies are twice as likely to maintain flexible, adaptable supplier strategies as companies with low resilience.

Business impact is widespread, but barriers persist

- 79% were affected by sustainability risks with significant business impact in the past three years. Regulatory and compliance risks lead (43%), followed by climate-related risks (30%), business ethics and corruption (22%), and human or labor rights violations (22%).
- The main obstacles to effective risk management are unreliable or incomplete data (31%), supplier engagement (25%), and limited resources or budgets (23%). Smaller and larger companies identify broadly similar barriers but differ in their capacity to address them.

AI adoption is expanding, but scaling remains limited

- 52% actively use AI for sustainability risk management, but only 8% have scaled it across multiple workflows or achieved end-to-end integration.
- Current use centers on data automation and continuous risk monitoring (40% each). Pattern recognition (31%) and risk prediction (30%) are somewhat less common, but the gap between operational and insight-driven applications is relatively narrow.
- 82% of active AI users see clear value, especially through efficiency, better decision-making, and greater risk visibility.
- 60% of all companies plan to expand or scale their use of AI, while 15% plan to continue with limited applications. 16% do not intend to expand AI use.
- Experience shapes intent: 72% of current AI users plan further expansion, compared with 49% of companies not yet using AI. This points to a widening gap between active and inactive companies.

Measuring impact strengthens the business case

- Only 14% systematically measure the business value of sustainability measures, and another 29% do so partially. 34% assess value only qualitatively, while 19% do not analyze it at all.
- 83% nevertheless report positive impact overall. Among companies that measure at least partially, 62% identify clear financial, operational, or resilience-related benefits. When positive effects that cannot be clearly quantified are included, this figure rises to 92%.
- Companies that assess value are three times more likely to make a quantified business case their primary investment driver (24% versus 8%).

Compliance leads the agenda, anticipatory capabilities lag behind

- External requirements are the leading investment driver (30%), closely followed by risk reduction and resilience (26%). A quantified business case (ROI) is the primary driver for 16%.
- 57% rank regulatory compliance as a top priority for strengthening or securing resilience. Stronger supplier collaboration (38%), sustainable business practices (35%), and more adaptable supply chains (33%) form the next tier.
- Anticipatory priorities receive less attention: 26% focus on climate adaptation and only 22% on risk anticipation and early-warning systems.

Company size is the strongest differentiator, industry and geography add context

Large companies outperform smaller ones across every metric tested, from integrated risk management and multi-tier visibility to AI use and impact measurement. Manufacturing stands out for integrated risk management, while the UK leads on visibility, Benelux on resilience and integration, and Scandinavia (incl. Iceland) on active AI use. These regional and industry results are indicative rather than definitive due to differing sample sizes and profiles.

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1. Introduction

From May to July 2026, [IntegrityNext](#), a leading provider of software solutions for sustainable supply chain management, conducted a survey in collaboration with international management and technology consultancy [BearingPoint](#) and, specifically for the DACH region, the [Berlin Institute for Supply Chain Management](#). The survey was part of a cross-regional research project involving more than 600 professionals, primarily from procurement, sustainability, compliance, and risk management. It explored the role of sustainability in managing supply chain risks and the extent to which artificial intelligence (AI) is being used in this context – against the backdrop of rising geopolitical tensions, persistent supply chain disruptions, and growing economic pressure.

The goal was to establish a benchmark for current business practices and to understand how leading companies build resilience and create tangible business value through sustainability.

Based on responses from 394 experts across Europe, this report provides a data-driven snapshot of how European companies address sustainability-related supply chain risks in 2026. **The findings point to a field in transition:** Compliance is firmly embedded in the organizational structures and strategic priorities of many companies. The next step – anticipating risks early and translating insights into a forward-looking resilience strategy – often still lies ahead.

This analysis complements a dedicated [German report on the DACH region](#) (Germany, Austria, Switzerland) and the [global findings](#).

Notes: Results are rounded, so totals may not always add up to exactly 100%. For multiple-choice questions, totals may significantly exceed 100%. The number of responses (n) is stated for each question. All responses were collected anonymously.

2. Respondent Profile

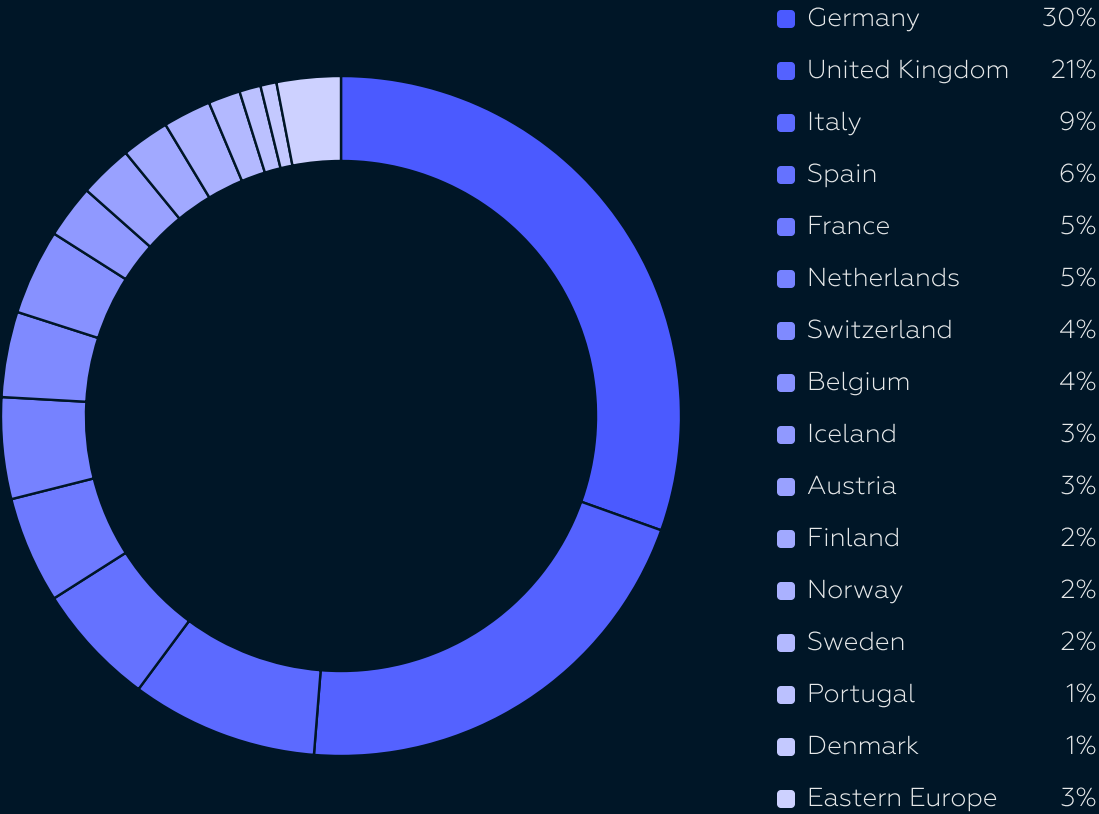
394 valid responses were analyzed for this European report. Respondents are spread across the continent, with Germany (30%) and the United Kingdom (21%) as the two largest single contributors, followed by Italy (9%), Spain (6%), France (5%), and the Netherlands (5%).

Grouped regionally, the split is as follows:

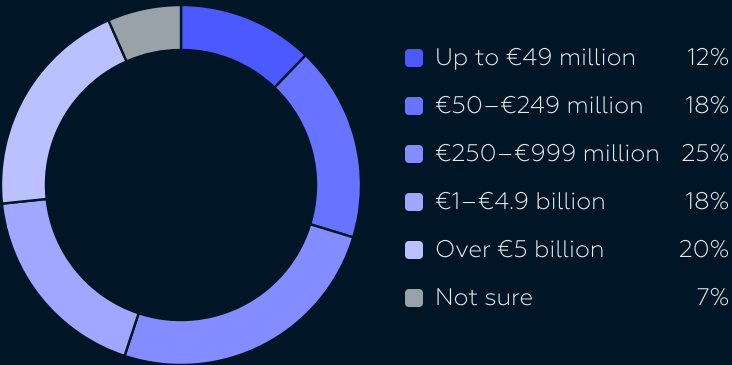
- **DACH** (Germany, Austria, Switzerland): 37%
- **Southern & Western Europe:** 21%
- **UK:** 21%
- **Scandinavia** (incl. Iceland): 9%
- **Benelux:** 9%
- **Eastern Europe:** 3%

The sample spans a wide range of company sizes: 66% of respondents work at companies with at least 1,000 employees, while 34% work at smaller companies. At the same time, organizations with revenues above €250 million account for 64% of the sample. Very large corporations with more than €1 billion in annual revenue make up 38%.

In which country is your company headquartered? (n = 394)



What is your company's annual revenue? (converted to EUR, n = 394)



What is the global headcount of your company? (n = 393)



Company Profile

Company Characteristics

Company Size

66% of surveyed companies employ 1,000 or more people

Leadership

58% of respondents hold leadership positions

Respondents work primarily in procurement & supply chain management (43%) and sustainability (22%). Compliance & risk management accounts for 11%, executive leadership for 10%, and HSEQ roles for 8%. Around 58% hold leadership positions, ranging from Head and Director level to VP and C-suite roles – reflecting a sample weighted toward senior decision-makers.

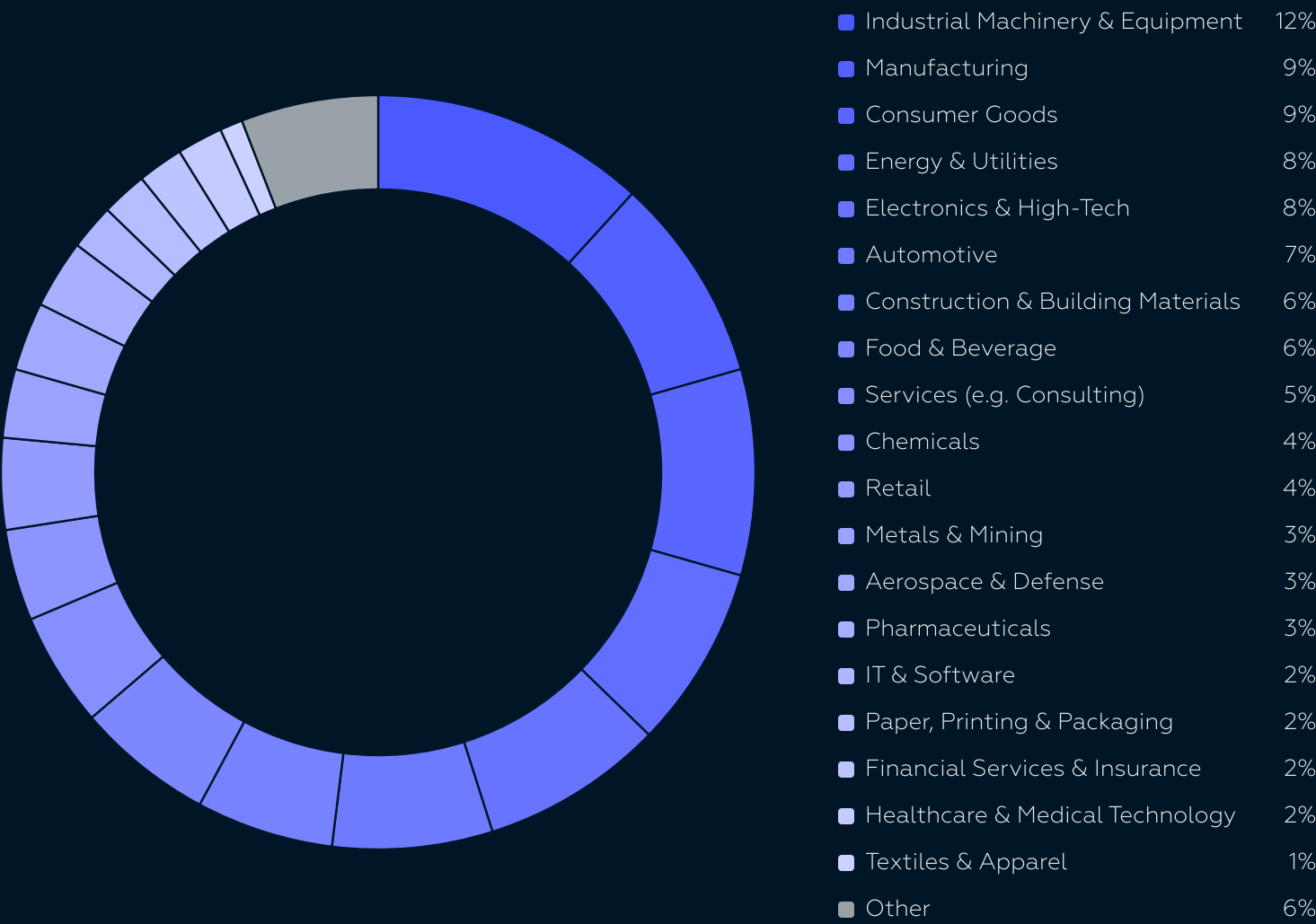
The sample is strongly industrial: Industrial Machinery & Equipment is the largest sector (12%), followed by Manufacturing and Consumer Goods (9% each), Energy & Utilities (8%), Electronics & High-Tech (8%), and Automotive (7%).

What the findings mean: The composition of the sample reflects the industrial, internationally distributed supply chains that characterize much of European manufacturing. Regulatory requirements such as national supply chain due diligence laws and EU legislation, including the Corporate Sustainability Due Diligence Directive (CSDDD) and the EU Deforestation Regulation (EUDR), are especially relevant for these companies, which likely contributed to the prominence of regulatory drivers seen throughout this report.

What is your current role? (n = 394)



In which industry does your company primarily operate? (n = 394)



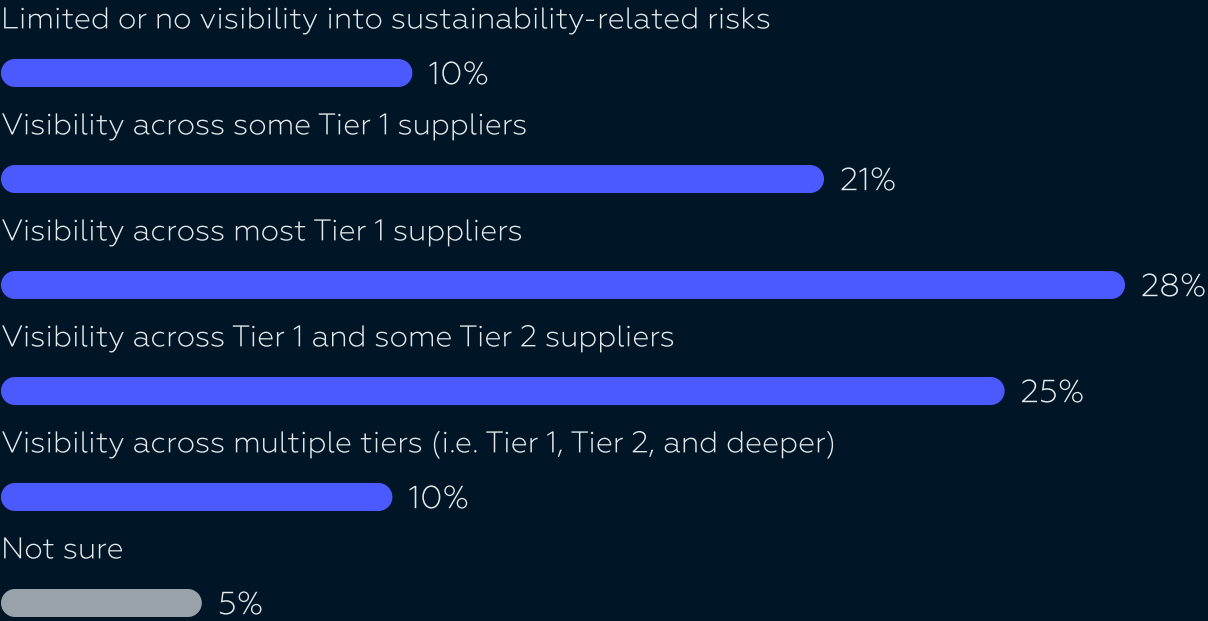
3. Risk Transparency and Supply Chain Resilience

For most companies, **visibility into sustainability-related risks** ends at the first tier of suppliers. 60% of respondents see at most as far as Tier 1. At the same time, 35% have insights beyond Tier 1, including just 10% of all respondents who achieve visibility across multiple tiers.

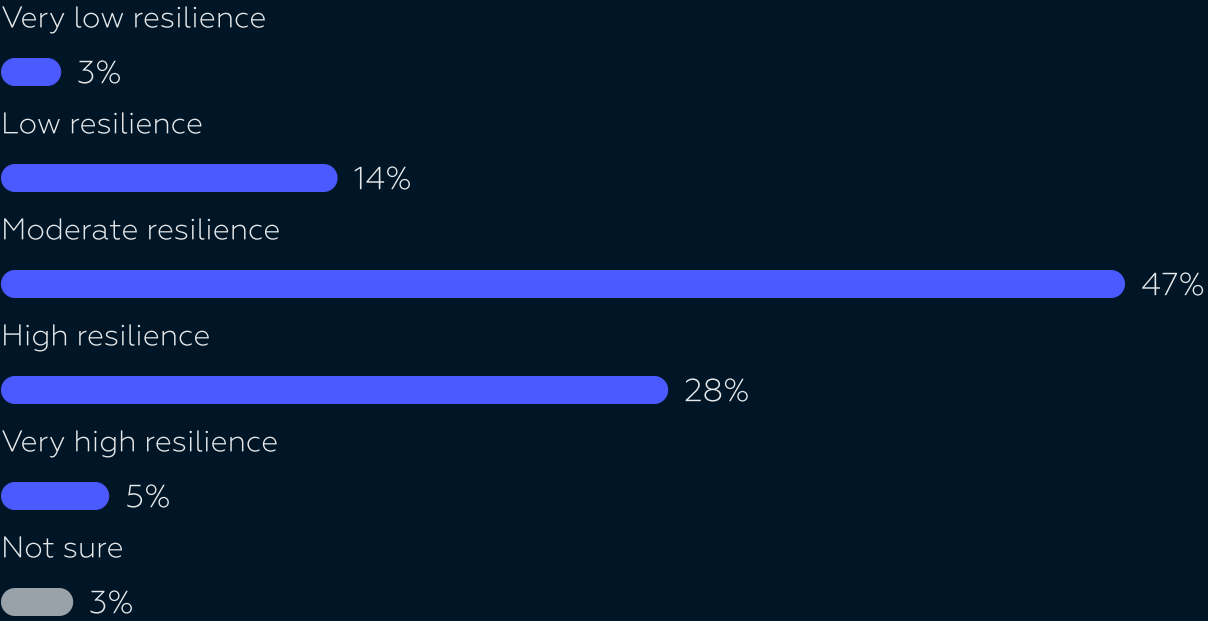
Supply chain resilience, the ability to anticipate and effectively respond to disruptions, follows a similarly cautious pattern. Nearly half of companies (47%) place themselves in the moderate range, rather than at either extreme. Only 33% rate their resilience as high or very high.



How would you rate visibility into sustainability-related risks across your supply chain? (single response, n = 394)



How would you rate your organization’s current level of supply chain resilience? (single response, n = 394)



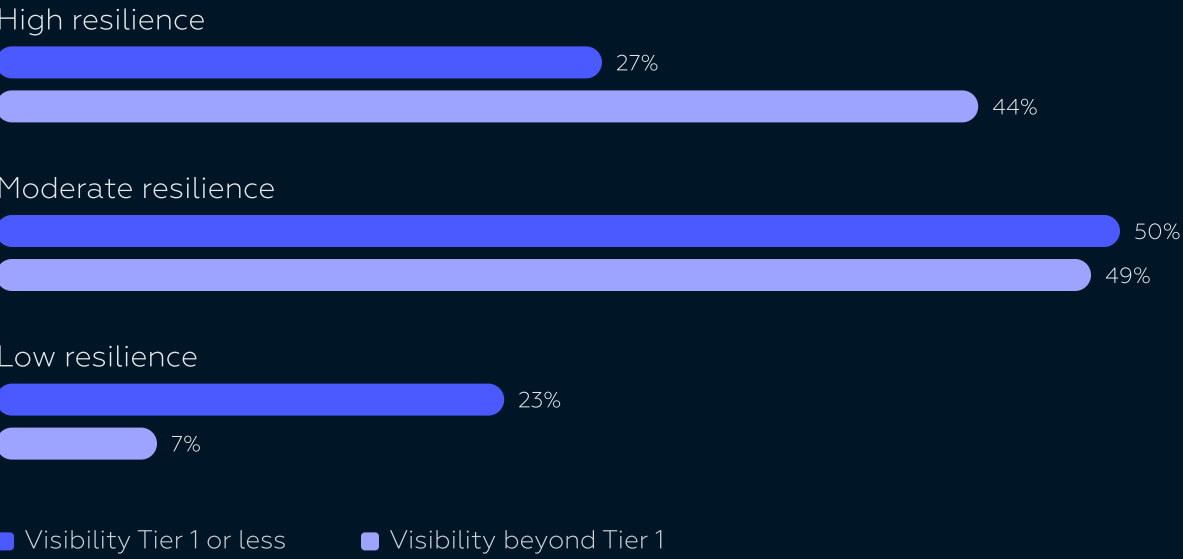
Looking more closely, transparency and resilience are closely associated: companies with visibility beyond Tier 1 are 1.6x more likely to rate their own resilience as high or very high than companies limited to Tier 1 (44% vs. 27%). The relationship is even sharper at the low end: companies with visibility restricted to Tier 1 are more than three times as likely to rate their resilience as low or very low (23% vs. 7%).

What the findings mean: Supply chain transparency shows a clear relationship with perceived resilience. Limited visibility beyond Tier 1 not only presents operational and strategic challenges but is also becoming increasingly critical in the context of regulatory due diligence requirements – notably the CSDDD, EUDR, and other legal obligations.

The fact that 64% of companies consider their supply chains to have only moderate or low resilience underscores the need for action. This aligns with the finding that only around one third of organizations use scenario analysis and forward-looking risk evaluations to better anticipate potential threats. As sustainability risks continue to grow – from forced labor to the physical impacts of climate change – the ability to identify risks early and prepare for different scenarios is becoming an increasingly critical factor for companies’ long-term viability.

3.3x
more likely to rate resilience as low when
visibility is limited to Tier 1

Perceived resilience in relation to supply chain visibility



4. Maturity of Risk Management

92% of respondents address sustainability-related supply chain risks in some form. But operational maturity varies widely: 42% have integrated the topic into key processes or fully embedded it in strategic decision-making. A further 28% take a structured but siloed approach across business functions, while 22% still operate on an ad hoc basis or carry out isolated initiatives. 6% do not address the topic at all.

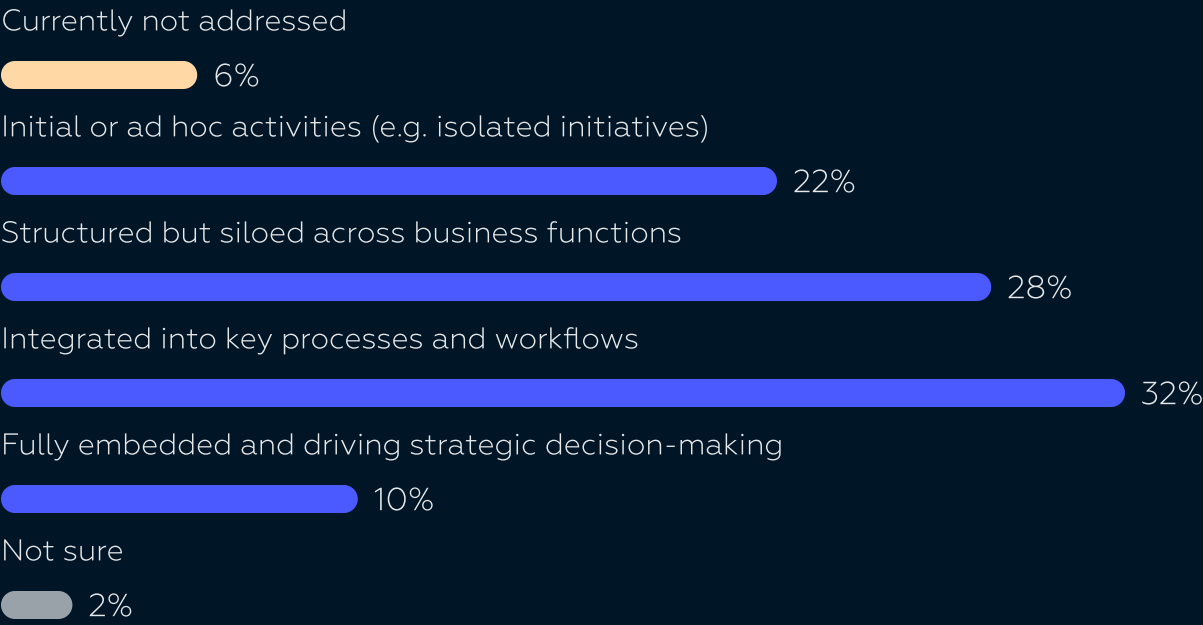
The risk management approach is a strong differentiator in the outcomes companies achieve through sustainability. Among companies with integrated or fully embedded risk management, 63% report clearly attributable business value, including financial benefits such as cost savings, operational improvements such as efficiency gains, or enhanced resilience. This is slightly more than double the 31% seen among companies pursuing sustainability on an ad hoc basis. When all types of positive impact are considered – including benefits that are harder to measure or attribute precisely – the gap narrows but persists: 92% vs. 70%.

42%
have integrated or fully embedded sustainability into their risk management processes

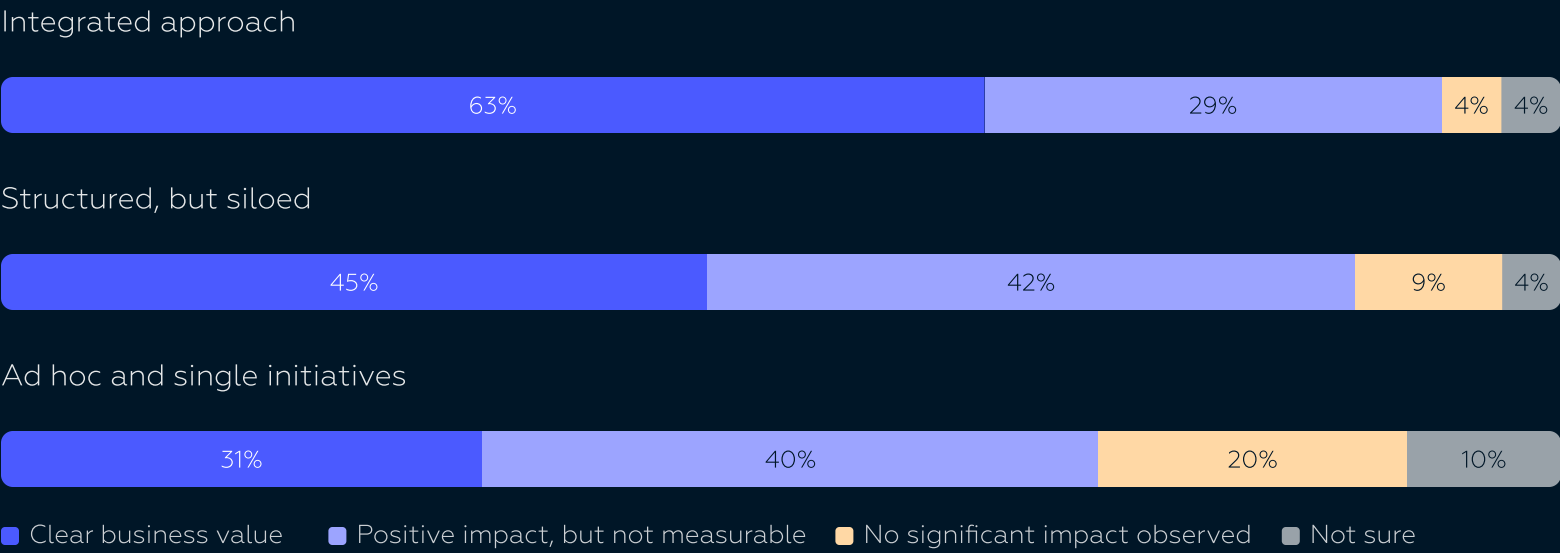
92%
of companies with integrated approaches see added value from their sustainability measures

2x
more likely to report clear business benefits with integrated risk management than with ad hoc approaches

How would you describe your organization’s approach to managing sustainability-related supply chain risks? (single response, n = 394)



Business impact of supply chain sustainability measures in relation to risk management approach



Looking at specific risk management practices, the most common are foundational ones: regular risk identification and assessment (53%), a defined strategy with policies and/or targets (49%), and continuous supplier engagement (48%). Practices that support forward-looking and more resilient decision-making are slightly less common – including scenario planning and future-oriented risk analysis (36%), systematic review and continuous improvement (35%), and flexible or diversified supplier strategies (33%).

42% of companies strengthen integration by making sustainability data and other risk metrics centrally available and promoting cross-functional collaboration.

Overall, highly resilient companies tend to have more mature risk management processes. They monitor risks more consistently, engage suppliers more frequently, foster cross-functional collaboration, and are considerably more likely to have flexible supplier strategies that enable them to adapt more quickly to changing circumstances.

What the findings mean: Structure alone is not enough. Moving from isolated, ad hoc practices to a structured but siloed approach appears to improve demonstrable business impact but does little for resilience. The strongest resilience outcomes are seen among companies with holistic risk management that is genuinely integrated across systems, business functions, and processes.

2x

as likely to have a flexible, adaptable supplier strategy when supply chain resilience is high vs. low

Which elements of sustainability-related supply chain risk management apply to your organization? (multiple responses, n = 394)



Prevalence of selected risk management elements in relation to perceived resilience

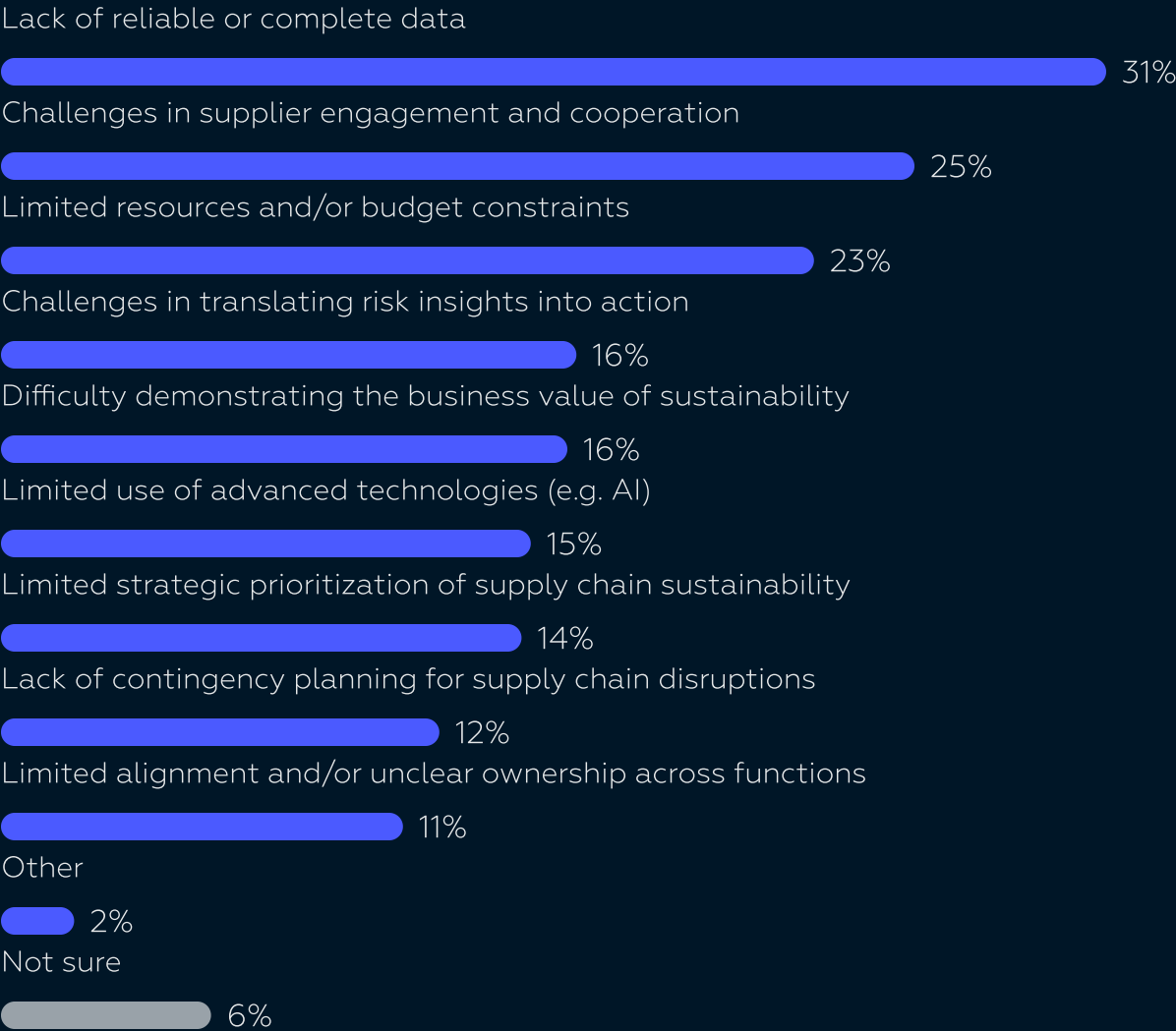


5. Challenges and Business Impact

Data quality remains the biggest obstacle to effective sustainability risk management: 31% of respondents cite a lack of reliable or complete data. This is followed by challenges in supplier engagement and cooperation (25%) and limited resources or budgets (23%). Notably, the ability to demonstrate business value and ROI (16%) ranks lower – even though, as Chapter 7 shows, only 14% of companies systematically measure the business impact of their sustainability efforts. The limited use of advanced technologies such as AI is also rarely seen as a challenge (15%). Still, as demonstrated in Chapter 6, 46% of companies are not actively using AI to manage sustainability-related risks. Given the benefits that the vast majority of active AI users report, this perception may change as adoption increases.

What the findings mean: The key obstacles to effective sustainability risk management in the supply chain identified in this study have been widely documented. Smaller (<1,000 employees) and larger companies (>1,000 employees) face largely the same barriers, but differ in their capacity to address them.

What are the biggest obstacles preventing your organization from effectively managing sustainability risks in the supply chain? (up to two responses, n = 394)



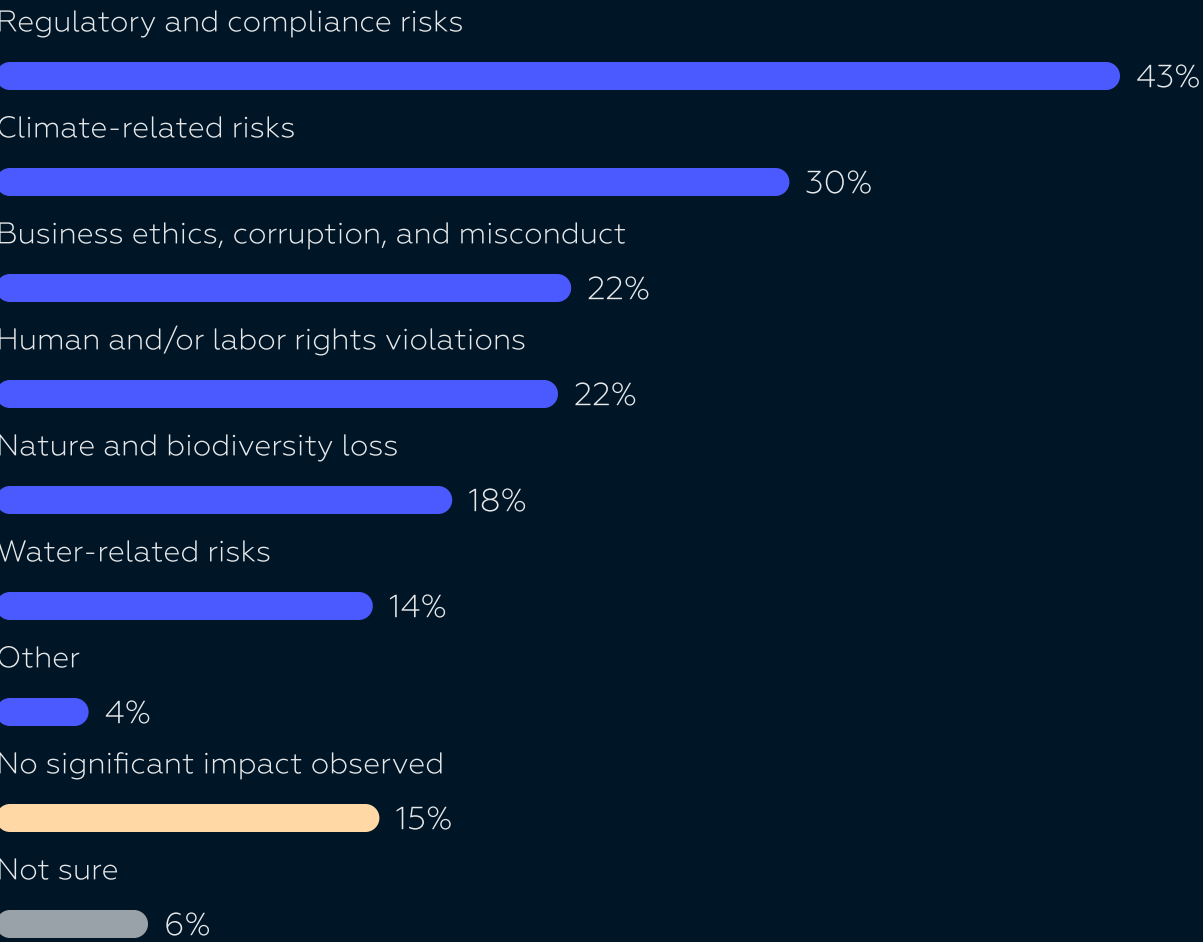
79% of companies were affected by at least one sustainability-related risk with significant financial or operational impact over the past three years. Regulatory and compliance risks are by far the most common (43%), followed by climate-related risks such as extreme weather or transition risks (30%). Business ethics and corruption (22%) and human or labor rights violations (22%) follow at some distance, with water-related and biodiversity risks remaining comparatively rare drivers of significant business impact.

What the findings mean: Regulatory and compliance risks clearly lead the risk landscape. While this is understandable given prevailing legal requirements, it may create an overly narrow view of supply chain risk: climate-related effects have already caused significant financial or operational impact for almost one third of companies. Human rights risks are also likely to become more relevant, not least due to the CSDDD and the EU Forced Labor Regulation, which will apply from December 2027.

79%

of companies were affected by supply chain sustainability risks with significant business impact in the past 3 years

Which sustainability risks in your supply chain have had the greatest financial and/or operational impact over the past 3 years? (up to three responses, n = 394)



6. AI Adoption: Status Quo, Value and Outlook

AI adoption for sustainability risk management is real but still limited. 52% of companies are actively using AI in some form – running pilots, deploying it in selected processes such as supplier risk analysis and reporting, or scaling it more broadly. While a further 27% are still exploring use cases without concrete deployment, 19% are not currently leveraging the technology at all and/or have no concrete plans to adopt AI.

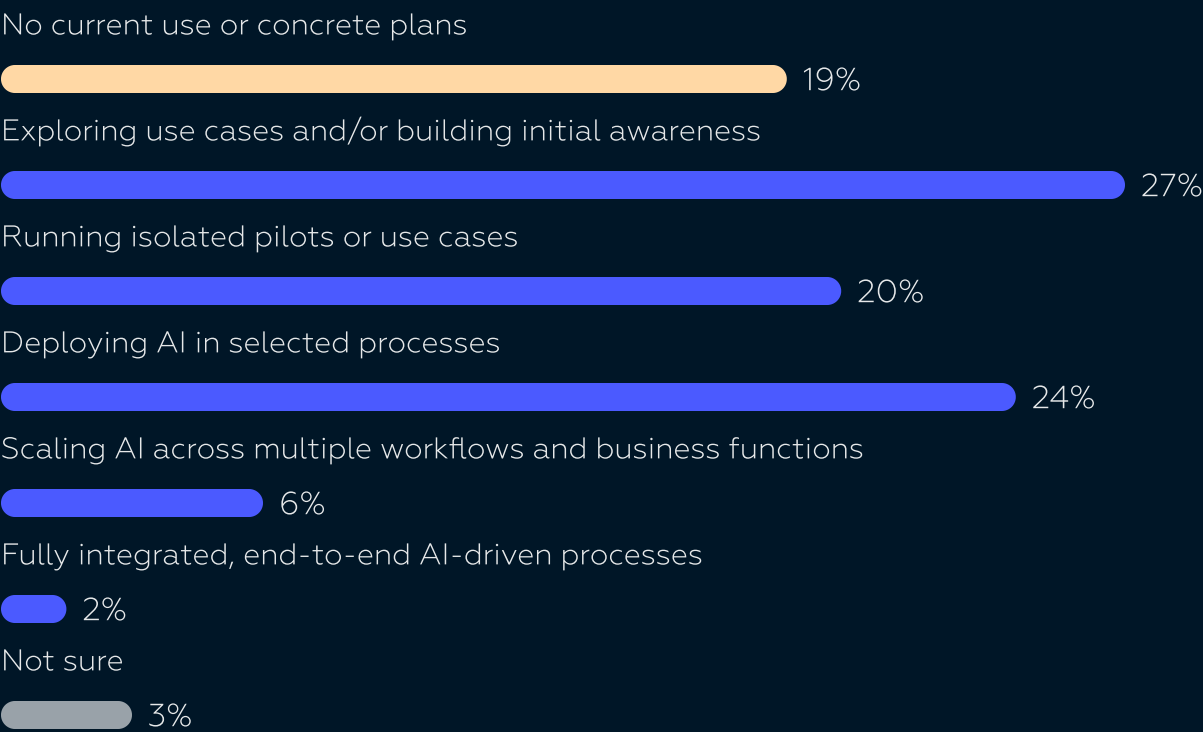
Only 8% of companies have progressed to meaningful scale, either by deploying AI across multiple workflows or by achieving full end-to-end integration.

As highlighted in Chapter 9, company size has a direct bearing on both AI use and expansion intent, with larger companies (>1,000 employees) more likely to embrace the technology and invest than smaller businesses.

52%
of companies are actively using AI beyond early exploration

8%
have scaled the use of AI for sustainability-related supply chain risk management

How far has your organization progressed in deploying AI for sustainable supply chain risk management? (single response, n = 387)



AI in Supply Chain Risk Management

Where AI is actively used, it tends to focus on more **conventional applications** and operational, efficiency-oriented tasks such as automating data collection, processing, and validation (40%) and continuous risk monitoring and alerting (40%), followed by optimizing follow-up actions such as supplier engagement (34%).

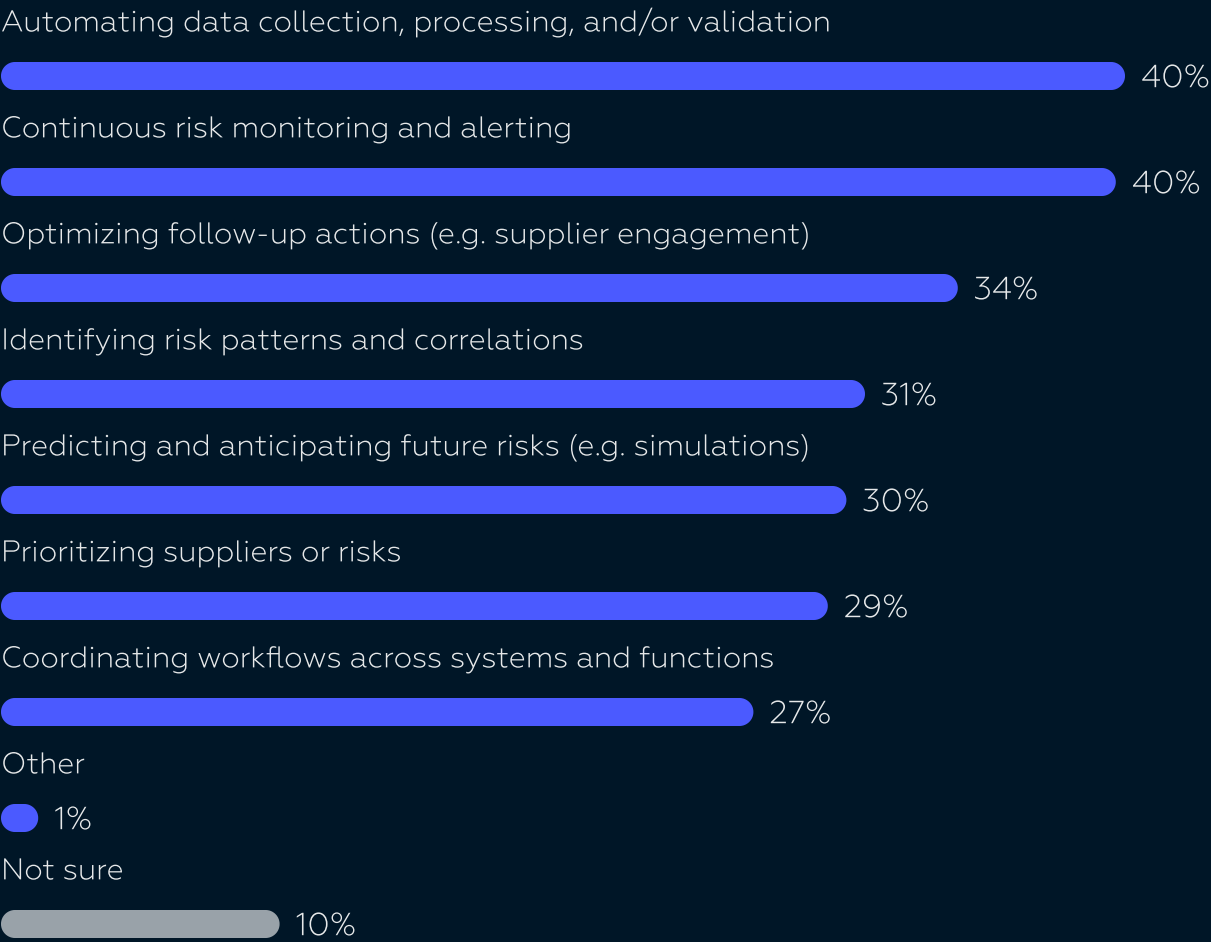
More insight-driven applications geared toward **actionable intelligence** – including identifying risk patterns (31%) and predicting future risks via simulations or trend analysis (30%) – are somewhat less common but not far behind, suggesting that the gap between operational and strategic AI use is narrower than in some other markets.

Finally, applications supporting **autonomous orchestration**, such as agentic AI, are also leveraged by some organizations. However, these use cases are often still in the early stages of development.

What the findings mean: AI is currently used primarily to improve efficiency and transparency, and to a lesser extent as a forward-looking risk management tool. This leaves considerable potential to harness the technology more extensively for targeted, proactive approaches.

For small and medium-sized enterprises (SMEs), AI offers significant opportunities to deploy limited human and financial resources more effectively through automation, continuous monitoring, and data-driven decision support.

Which of the following AI capabilities are currently used to manage sustainability-related supply chain risks? (multiple responses, n = 303)



Value delivered by AI

82% of active users see clear value in leveraging AI for sustainability risk management

Among companies actively using AI beyond early exploration, the **value delivered** is predominantly operational: improved efficiency and scalability (27%), better and faster decision-making (24%), and enhanced risk visibility (23%) are the most frequently cited benefits. 7% of companies have been unable to achieve any clear value from AI so far.

Improving efficiency and scalability

Supporting better and faster decision-making

Enhancing risk visibility and understanding

Enabling more effective execution of risk mitigation measures

Improving operational alignment across functions and processes

Strengthening the ability to anticipate and respond to disruptions

Other

No clear value realized so far

Not sure

In which areas has AI delivered the most tangible value in managing sustainability-related supply chain risks? (up to two responses, n = 316)

Improving efficiency and scalability 27%

Supporting better and faster decision-making 24%

Enhancing risk visibility and understanding 23%

Enabling more effective execution of risk mitigation measures 20%

Improving operational alignment across functions and processes 16%

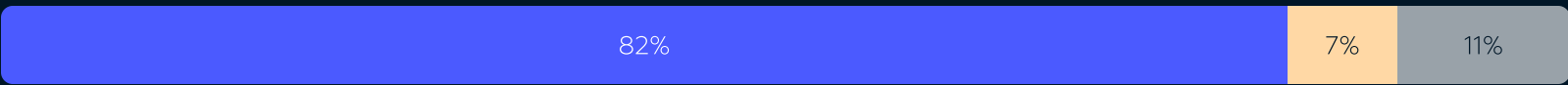
Strengthening the ability to anticipate and respond to disruptions 15%

Other 1%

No clear value realized so far 7%

Not sure 11%

Overall assessment of the value delivered by AI applications currently in use



■ Tangible value achieved with AI ■ No clear value realized so far ■ Not sure

The **outlook for AI adoption** points to continued growth. In total, 60% of companies plan to expand or scale their use of AI.

However, a growing divide is emerging between companies with and without AI experience. Current exposure strongly shapes future intent:

- Of the companies already embracing AI – from pilot projects to full-scale integration – 72% plan to expand its use further.
- The picture is slightly different among companies that do not currently use AI: 49% intend to enhance deployment in the future, while 37% have no such plans.

Planned investment largely mirrors current applications: automating data collection, processing, and validation (41%) and continuous risk monitoring (38%) top the list, suggesting that companies intend to deepen existing use cases before branching into materially new ones.

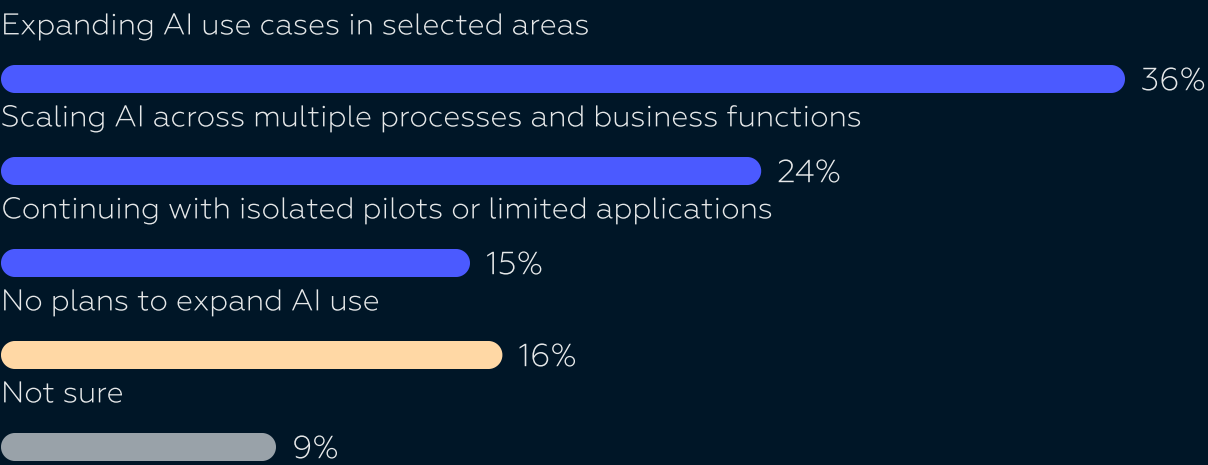
What the findings mean: Most companies currently use AI for conventional applications such as automation and risk transparency and plan to continue doing so in the future. These applications address some of the key barriers to effective sustainability risk management identified in this study.

The survey also revealed a self-reinforcing pattern, with current AI users more likely to keep investing than non-users. This means the gap between active and inactive companies is likely to widen further without deliberate efforts to close it. The fact that 82% of current users report clear benefits from AI in supply chain risk management may encourage companies that are still hesitant to adopt the technology.

72% vs. 49%

AI expansion intent among current users vs. non-users

How do you expect your organization’s use of AI in sustainable supply chain management to evolve over the next 1–2 years? (single response, n = 387)



In which AI capabilities do you intend to invest to manage sustainability risks in your supply chain? (multiple responses, n = 387)



7. Impact Measurement

In times of economic uncertainty and tight budgets, sustainability initiatives often come under pressure. This makes it all the more important for procurement and sustainability leaders to demonstrate the value of their efforts.

However, measuring the impact of sustainability initiatives remains the exception rather than the rule. Only 14% of companies fully measure and systematically track business value, and a further 29% do so partially. 34% consider value only qualitatively, and 19% do not assess it at all.

Despite limited measurement, the overall impact of sustainability appears largely favorable. 36% report positive effects that are not clearly measurable or attributable, while a combined 48% report more concrete benefits – improved resilience (20%), clear operational improvements (15%) such as efficiency gains, and measurable financial impact (13%). 11% report no significant impact.

Measurement and demonstrable impact go hand in hand: 62% of companies that measure the value contribution of their sustainability measures fully or at least partially report financial, operational, or resilience-related benefits (vs. 36% of companies that do not measure value). When positive effects that cannot be clearly quantified are added, this figure rises to 92%.

What the findings mean: Overall, 83% of organizations report positive impacts from their sustainability initiatives. The findings underscore the importance of systematic and robust measurement. It helps companies demonstrate their achievements, assess initiatives more effectively, and strengthen the business case for sustainability investments.

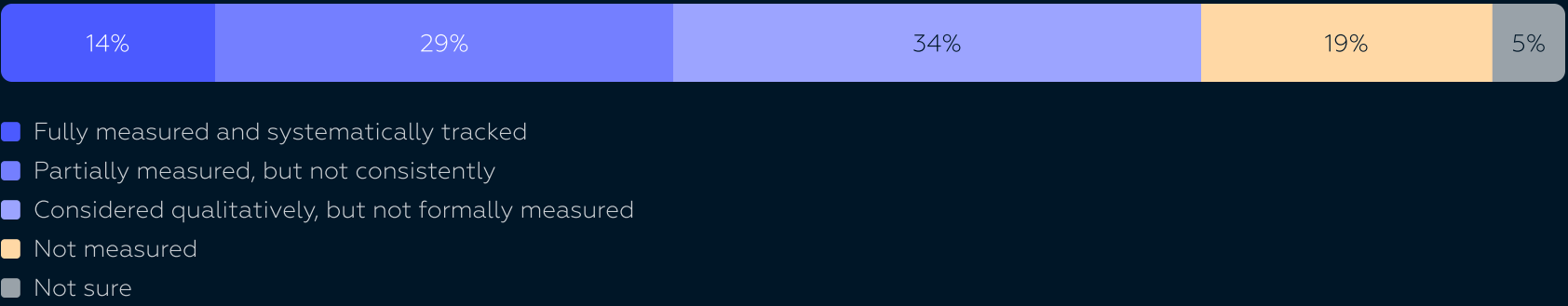
14%

systematically measure the value generated by their sustainability initiatives

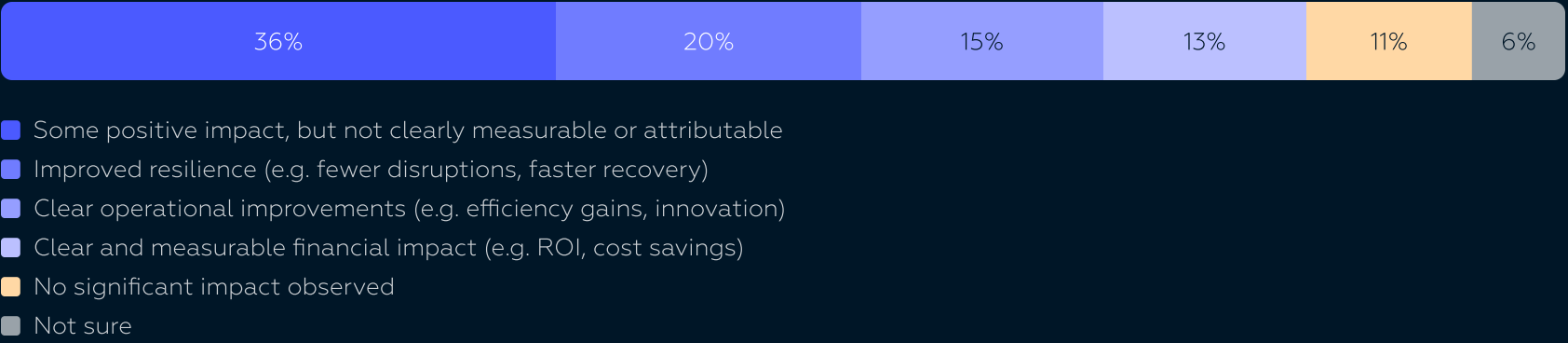
83%

of companies report positive impacts from their sustainability efforts

To what extent do you measure the business value of sustainability-related supply chain efforts? (single response, n = 375)



How would you describe the main business impact you have achieved from sustainability-related supply chain efforts? (single response, n = 369)



8. Investment Drivers and Strategic Priorities

Investment in supply chain sustainability is often externally driven. 30% of companies cite regulatory, customer, or other stakeholder requirements as the primary driver, followed by risk reduction and resilience (26%). A clearly defined and quantified business case drives investment for 16% of companies, while broader strategic business goals account for 11%.

Impact measurement matters in this context: among companies that quantify the value of their sustainability efforts, 24% cite a quantified business case as their key investment driver – three times the 8% seen among companies that do not assess value.

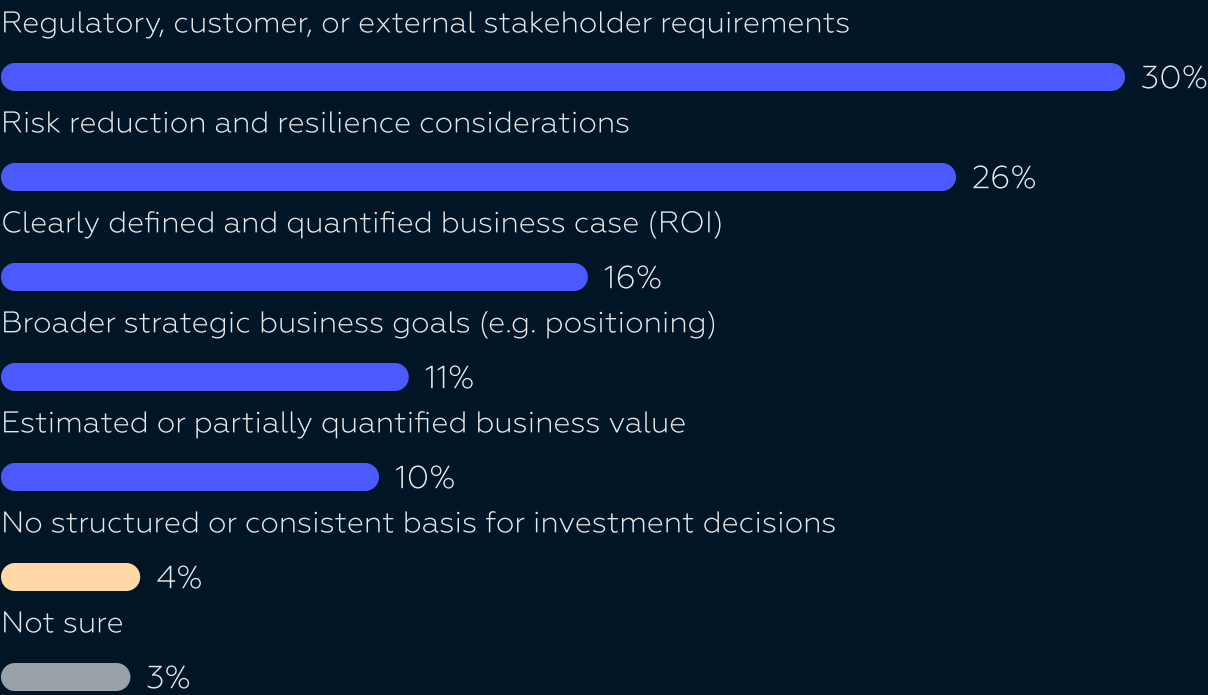
What the findings mean: External factors, particularly regulatory requirements, play a major role in investment decisions. This may lead to an overly narrow focus on demonstrating compliance, potentially shifting attention away from more strategic and forward-looking objectives. Still, one quarter of companies invest in sustainability specifically to mitigate risks and strengthen resilience.

Impact measurement also offers a more value-oriented perspective: companies that track the value generated by their initiatives are more likely to base investment decisions on a quantified business case. This can help position sustainability internally as a driver of value creation.

26%

primarily invest in sustainability to reduce supply chain risks and strengthen resilience

What primarily drives decisions to invest in supply chain sustainability? (single response, n = 374)



The **strategic priorities for strengthening resilience** are clear. A total of 57% of respondents rank compliance with regulatory requirements such as due diligence obligations as one of their top priorities.

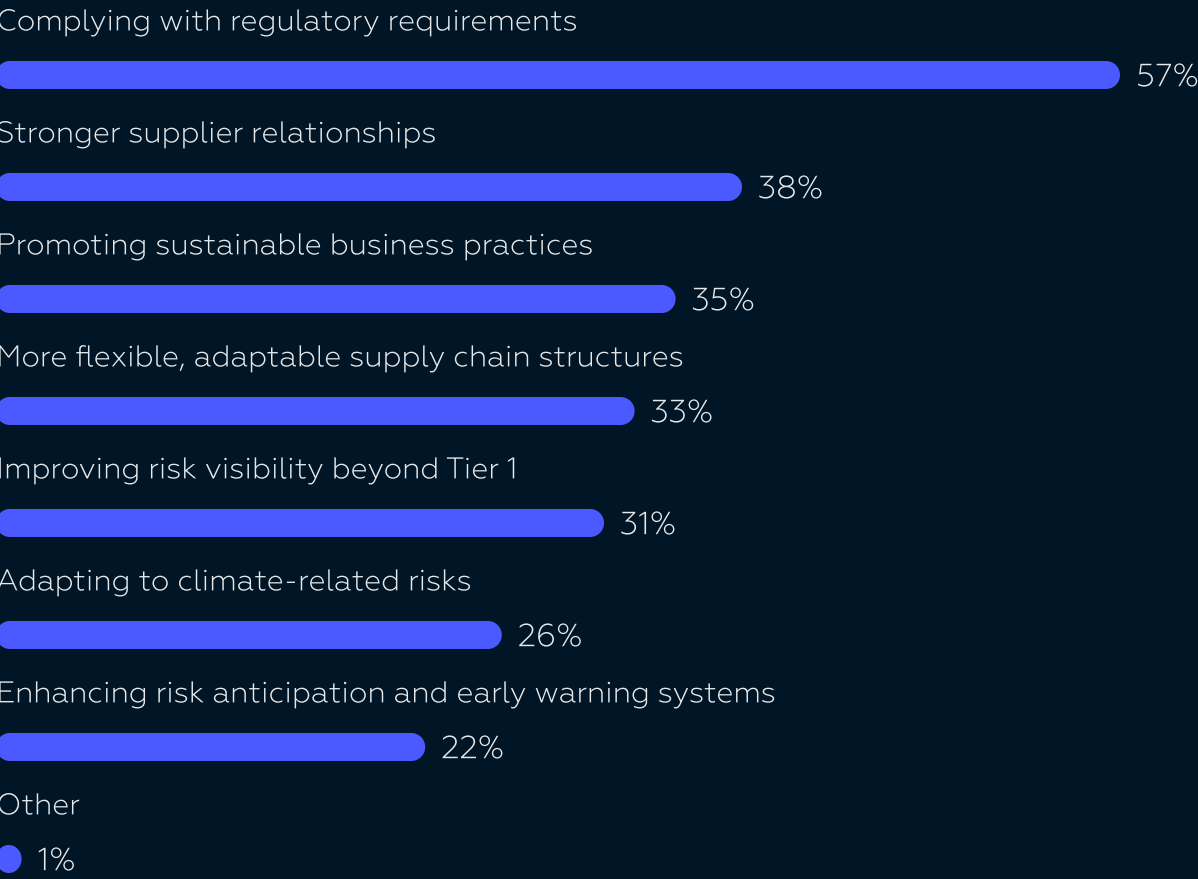
This is followed by a cluster of measures with similar scores: closer collaboration and stronger partnerships with suppliers (38%), promoting sustainable business practices, such as adherence to human rights standards (35%), and creating more flexible and adaptable supply chains (33%), for example through multi-sourcing.

Notably, the measures receiving less attention are precisely those aimed at forward-looking risk management: adapting to climate-related risks (26%), anticipating threats and establishing early-warning systems (22%), for example through scenario planning and trend analysis.

What the findings mean: Regulatory compliance is still a major driver of companies’ supply chain efforts. However, building greater resilience also requires forward-looking management capabilities that enable businesses to anticipate risks, respond more effectively, adapt to disruption, and be better prepared for emerging threats. Efforts to enhance risk visibility beyond Tier 1 (cited by 31%) are a critical step on this journey – not least given the current limitations in multi-tier transparency and the relationship with supply chain resilience identified in Chapter 3.



Which strategic priorities will be most critical to strengthening your organization’s supply chain resilience over the next 3 years? (up to three responses, n = 384)



9. The Role of Company Size, Industry, and Country

To examine the influence of **company size**, respondents were split into two groups: smaller companies with fewer than 1,000 employees (n = 131) and larger companies with 1,000 or more employees (n = 262). The results were then compared across the report’s key metrics.

Company size is the strongest differentiator identified in this study. Large companies lead on every topic tested and are more likely to:

- have integrated risk management
- see beyond Tier 1
- rate their resilience as high
- actively deploy and expand the use of AI
- measure the value of sustainability
- report clearly attributable business impact

AI use also diverges in focus, not just in the extent of deployment. Among AI users, large companies invest three times more often in continuous risk monitoring than smaller companies. They are also more likely to invest in other risk intelligence capabilities, while smaller companies’ AI efforts are skewed more toward simpler automation and efficiency tasks.

What the findings mean: Larger companies generally have more advanced infrastructure and capabilities for managing sustainability risks. AI could help smaller organizations narrow the gap, enabling them to deploy and scale solutions without extensive in-house systems or additional headcount. Notably, 48% of SMEs with fewer than 250 employees plan to expand their use of AI, virtually the same share as in the broader group of smaller companies (<1,000). Across all other topics, SMEs typically exhibit a significantly lower performance.

Results of selected metrics by company size



Industry background also shapes business practices, though with more variation than company size. Given the small number of participating companies in some industries and to avoid overstating findings, each sector was statistically tested against the rest of the sample across key topic areas.

The manufacturing industry (n = 34 or 9%) delivered the most consistent and statistically significant results. It shows substantially higher risk management maturity than the rest of the sample and scores above average on AI use, impact measurement, and attribution of business impact. Industrial Machinery & Equipment, the largest industry represented in this study (n = 47 or 12%), shows no statistically significant difference from the rest of the sample on any of the metrics tested and generally scores close to the European average.

The table on the right shows which industries score highest on each metric. It provides an indication of what is achievable but **should be interpreted with caution**, as the differences are largely descriptive rather than statistically proven. As such, it is noteworthy that Food & Beverage ranks highest on four of the six metrics — visibility, resilience, AI use, and value measurement. That said, the industry performs below average in other areas and therefore cannot be considered consistently ahead of other sectors.

71% vs. 39%

share of companies with integrated risk management: manufacturing vs. all other industries

Manufacturing industry results vs. rest of the sample



Highest-scoring industry per metric vs. European average

Metric	European Average	Industry with Highest Score	Share of Total Sample	Score
Visibility beyond Tier 1	35%	Food & Beverage	6%	52%
High supply chain resilience	33%	Food & Beverage	6%	52%
Integrated risk management	42%	Manufacturing	9%	71%
Active use of AI	52%	Food & Beverage	6%	70%
Impact measured	43%	Food & Beverage	6%	65%
Impact clearly attributable	48%	Consumer Goods Automotive	9% 7%	62%

Geography is the final differentiating factor examined in this study. Grouping countries into regions – rather than ranking individual countries, many of which have too few respondents for reliable analysis – provides a more robust basis for comparison. The table on the right shows the top-performing region for selected categories, assessed against the rest of Europe using the same significance testing applied to the industry benchmarking.

The UK leads on supply chain visibility beyond Tier 1; Benelux on resilience and the integration of sustainability into risk management; and Scandinavia & Iceland on active AI use.

When looking at the key metrics side by side (see table), it becomes apparent that DACH trails the other regions in several areas. However, it is worth highlighting marked differences between the DACH sample and the other countries that may explain some of the gaps:

- **Respondent profile:** More specialist roles and fewer procurement professionals; lower share of participants holding leadership positions in DACH (40% vs 58% across Europe)
- **Company size:** More SMEs (<250 employees) and companies below 1,000 employees in DACH (combined 46% vs. 34% across Europe)

What the findings mean: The results of this survey are intended to provide a snapshot rather than a fully representative analysis of Europe as a whole. Regional sample sizes vary considerably – from 146 respondents in DACH down to 35 in Benelux. The results for smaller regions in particular should therefore be read as indicative rather than definitive. In addition, the underlying sample is skewed toward larger, industrial companies which may not reflect the actual distribution of company sizes, sectors, or functions in every region. **Regional comparisons are best interpreted as directional signals worth investigating further rather than precise, generalizable estimates of differences between regions.**

Key performance metrics by region

Region (n)	Visibility Beyond Tier 1	High Resilience	Integrated Management	Active AI Use
DACH (146)	28%	22%	35%	46%
Southwestern Europe (83)	38%	37%	41%	59%
UK (82)	44%	45%	44%	45%
Scandinavia & Iceland (37)	43%	32%	54%	70%
Benelux (35)	37%	49%	57%	63%

Note: Eastern Europe was excluded from analysis due to small sample size.

10. Conclusion: From Compliance to Forward-Looking Risk Management

Europe's sustainable supply chain practices are in transition. 79% of companies have already experienced sustainability-related risks with significant financial or operational impact, and 57% rank regulatory compliance among their top priorities for strengthening resilience. Yet the capabilities that help companies anticipate and respond to disruption – multi-tier visibility, scenario analysis, early-warning systems, climate adaptation, and flexible supplier strategies – remain far from universal.

Compliance ensures accountability, but it does not by itself reveal how resilient supply chains really are. Resilience depends on turning risk signals into proactive, coordinated decisions before disruption occurs.

Four priorities for resilience and value creation

- **Extend visibility beyond Tier 1.** Deeper insight helps companies identify dependencies and emerging threats earlier. The clear relationship between visibility and perceived resilience makes multi-tier transparency a strategic capability, not only a due diligence requirement.

- **Integrate risk management across the business.** Central data, continuous monitoring, cross-functional collaboration, and a clear path from risk insights to action distinguish more mature companies. Integrated approaches are associated with both higher perceived resilience and greater demonstrable business value.
- **Measure the value created.** Systematic impact measurement allows companies to demonstrate financial, operational, and resilience-related benefits. It also changes the investment conversation: companies that quantify the value of their sustainability efforts are more likely to base decisions on a clear business case.
- **Embed anticipation into everyday decisions.** Scenario analysis, early-warning systems, climate adaptation, and flexible sourcing help organizations anticipate and respond to both immediate disruptions and long-term change. Their value depends on translating insights into clear mitigation measures, supplier engagement, and sourcing strategies.

Together, these priorities can move sustainability from a primarily compliance-led obligation to an integrated discipline that strengthens resilience and creates measurable business value.

The enabling role of AI

AI can accelerate this shift by improving data quality, automating repetitive work, enabling continuous monitoring, and supporting risk prediction and decision-making. Adoption is already significant, and 82% of active users report clear value. However, only 8% have reached meaningful scale, leaving considerable room to embed AI more deeply into risk management processes.

The next phase will be shaped by who can turn experimentation into strategic capabilities. Larger companies lead across AI maturity metrics, while current users are more likely to keep investing. For smaller companies in particular, scalable AI tools offer a route to stronger monitoring and analysis without the need for proportionate investment in systems or additional headcount. The key question is no longer whether AI can add value, but where it can best support faster, better-informed, and more forward-looking decisions.



The Bigger Picture

This report presents the European findings of a broader international study involving more than 600 respondents. The accompanying reports on the [DACH region](#) (German only) and the [global results](#) explore how priorities, AI maturity, and the business impact of sustainability differ across markets.

About us

IntegrityNext is a leading provider of AI-powered supply chain sustainability software, helping companies build more sustainable, resilient, and transparent value chains. With a network of over 3 million suppliers, our platform combines comprehensive primary data, real-time risk intelligence, and regulatory expertise to enable sustainable procurement, proactive risk management, and compliance.

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