



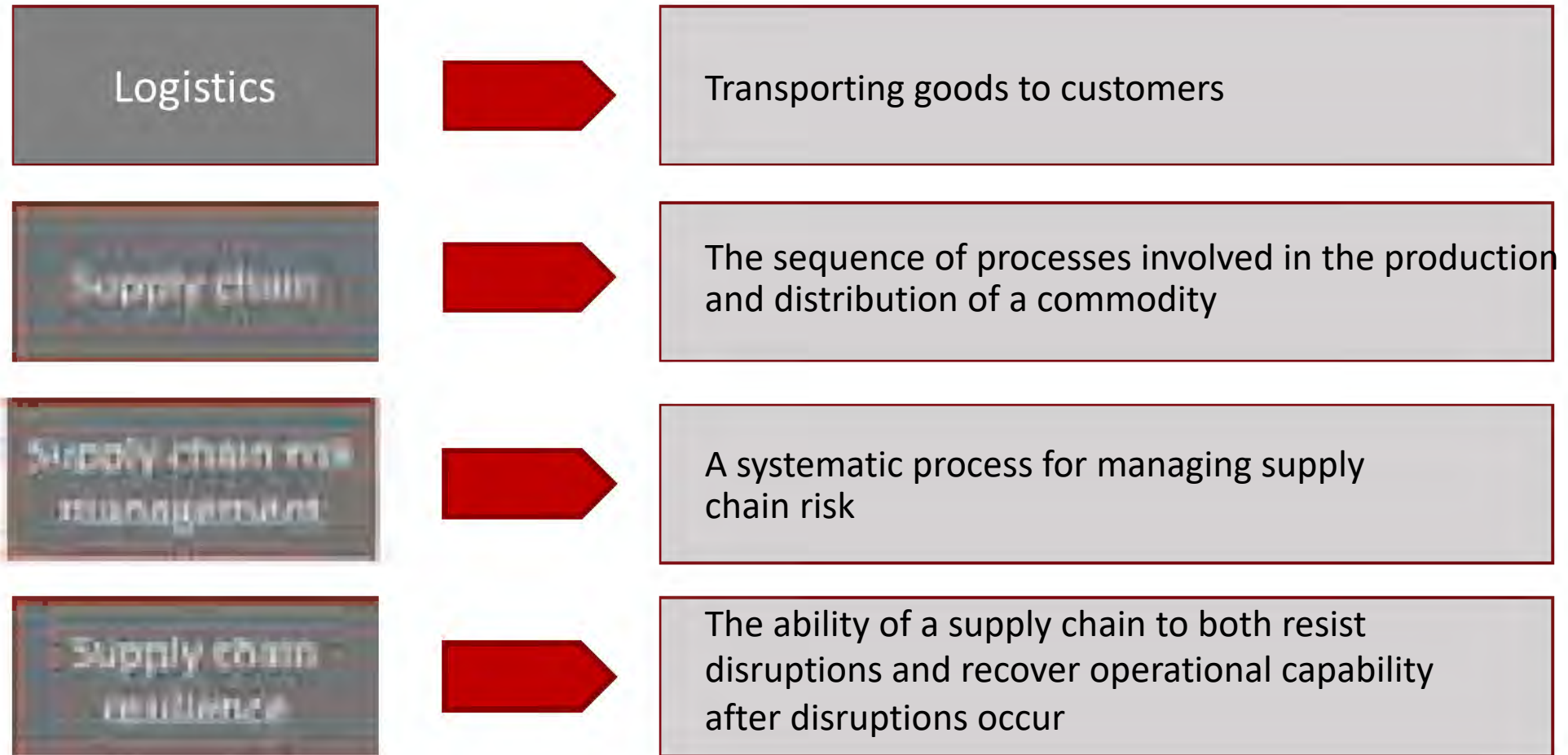
Evaluating Supply Chain Resilience

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What are we talking about?



Key components of supply chains

- **Supply nodes** – where stuff comes from
- **Demand nodes** – where it goes
- **Links** – how it gets there



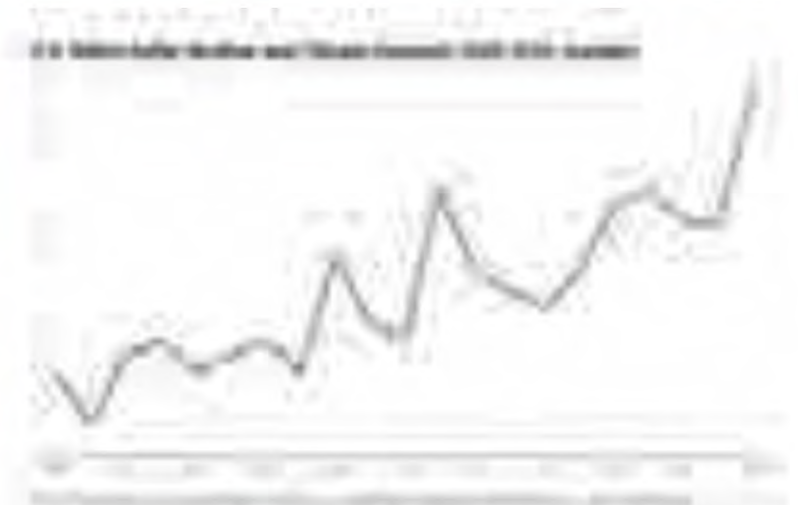
What do we know about supply chains?



What trends are we seeing?



Increase in disruptive events



What trends are we seeing?



Increase in disruptive events



Growing awareness of supply chains and supply chain resilience

Americans most likely to blame shipping, government for supply chain shortages

How much do consumers blame various entities for their role in the supply chain issues?



Impacts on supply chains since COVID

94% of Fortune 1000 companies are seeing supply chain disruptions from COVID-19

75% of companies have had negative or strongly negative impacts on their businesses

55% of companies planned to downgrade their growth outlooks (or had already done so)

Source: Accenture

What trends are we seeing?



Increase in disruptive events



Growing awareness of supply chains and supply chain resilience



Ongoing tension between cost-efficiency and resilience

What should we do?



MAP OUR SUPPLY
CHAINS



BUILD RELATIONSHIPS
WITH PARTNERS



CONDUCT A STRESS
TEST



Legend

⊙ Distribution Center

Grocery Density

- █ Higher % market share
- █ Med. % market share
- █ Lowest (less than 2 stores)









What's ahead?

- Increased likelihood of shocks to supply chain systems
- Continued inflationary pressures as shortages persist and supply chains are reconfigured
- Disproportionate impacts to vulnerable populations will persist
- **CALL TO ACTION**
 - Increase attention by emergency management agencies
 - Greater collaborative public/private engagement
 - Continue investment in resilient infrastructure

Thank You!



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