



SURVEY RESULTS

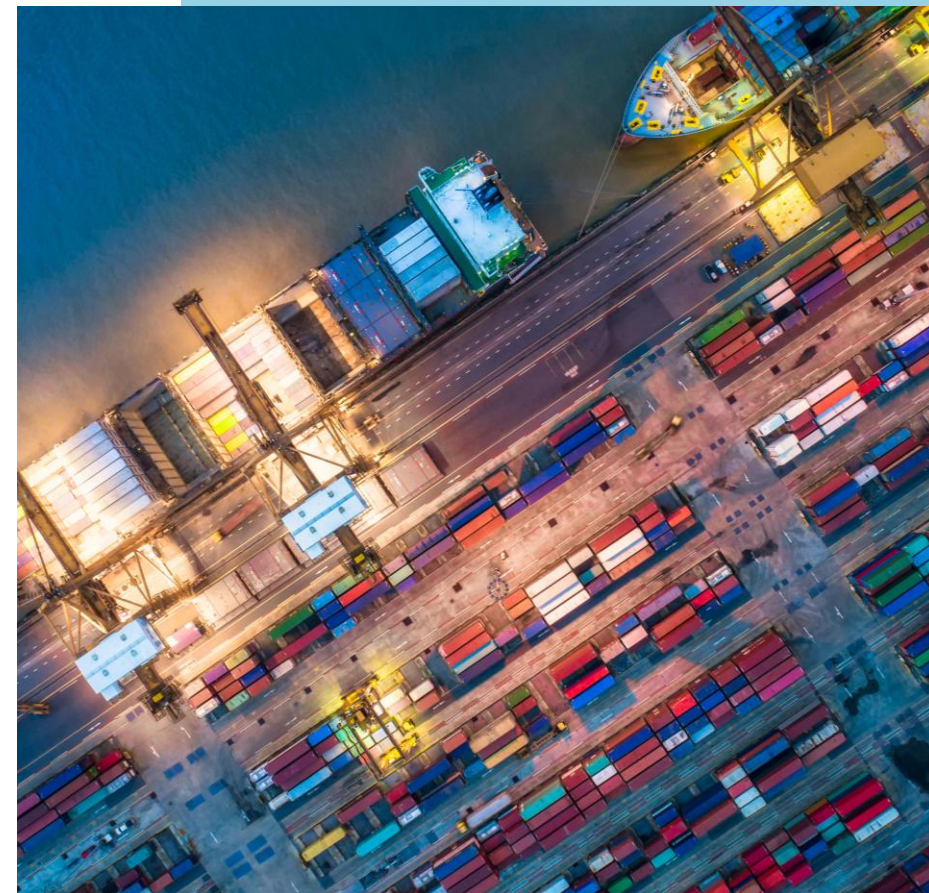
RISING COST PRESSURE
AND LIMITED VISIBILITY

Results | Munich, 07.04.2026



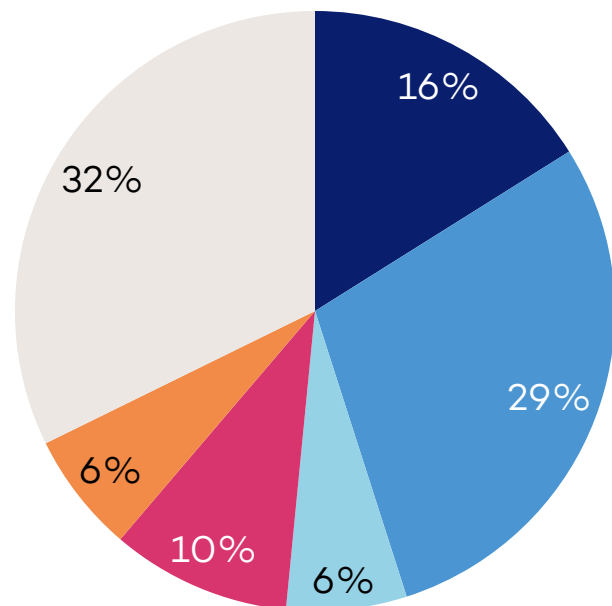
EXECUTIVE SUMMARY

- **COST PRESSURE IS THE DOMINANT IMPACT PATTERN:** AROUND 95% OF COMPANIES EXPECT RISING ENERGY AND OPERATING COSTS.
- **FINANCIAL VISIBILITY IS LIMITED:** 36% CANNOT YET QUANTIFY THE EBITDA IMPACT.
- **PREPAREDNESS REMAINS WEAK:** ONLY A SMALL MINORITY SEES ITSELF AS VERY WELL PREPARED; MOST ORGANISATIONS ARE ONLY PARTIALLY PREPARED.
- **THE CURRENT RESPONSE IS LARGELY DEFENSIVE:** COMPANIES FOCUS ON COST, PRICING AND SHORT-TERM MARGIN PROTECTION MORE THAN ON STRUCTURAL TRANSFORMATION.

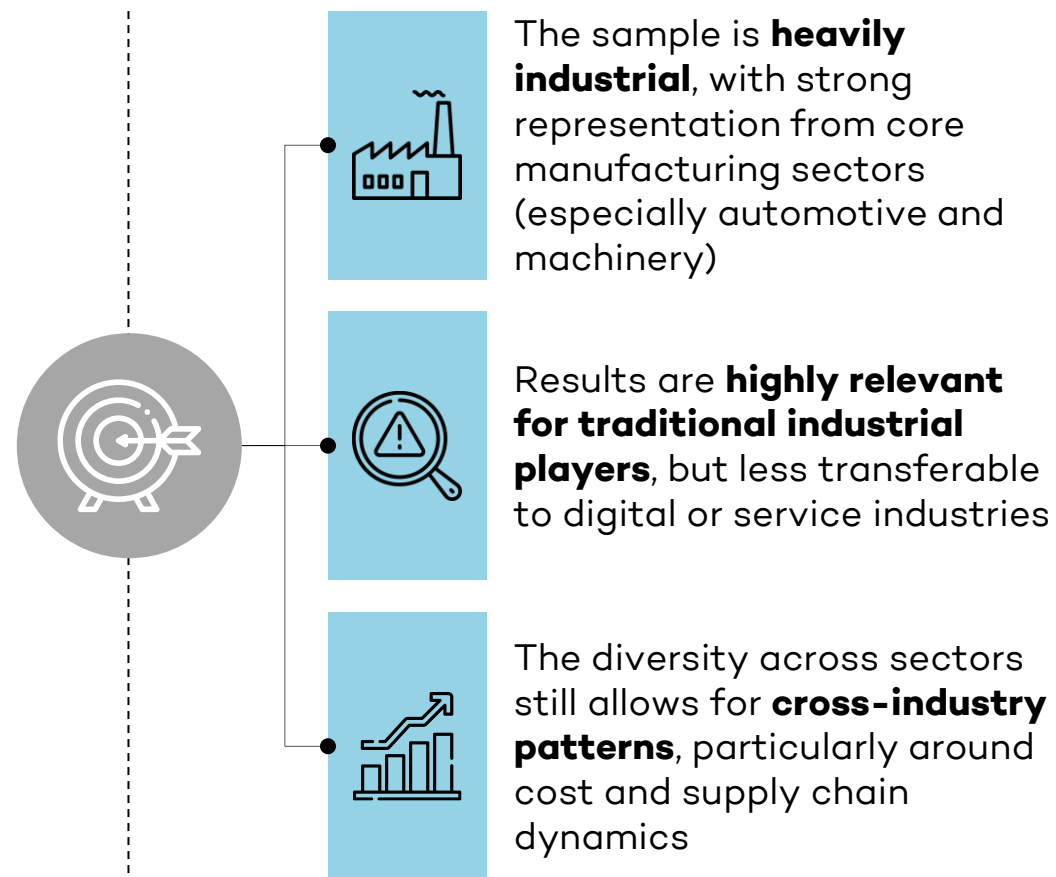


FLASH SURVEY

Which industry does your company operate in?

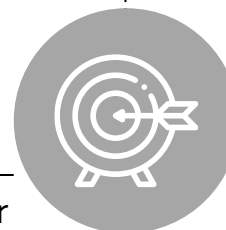
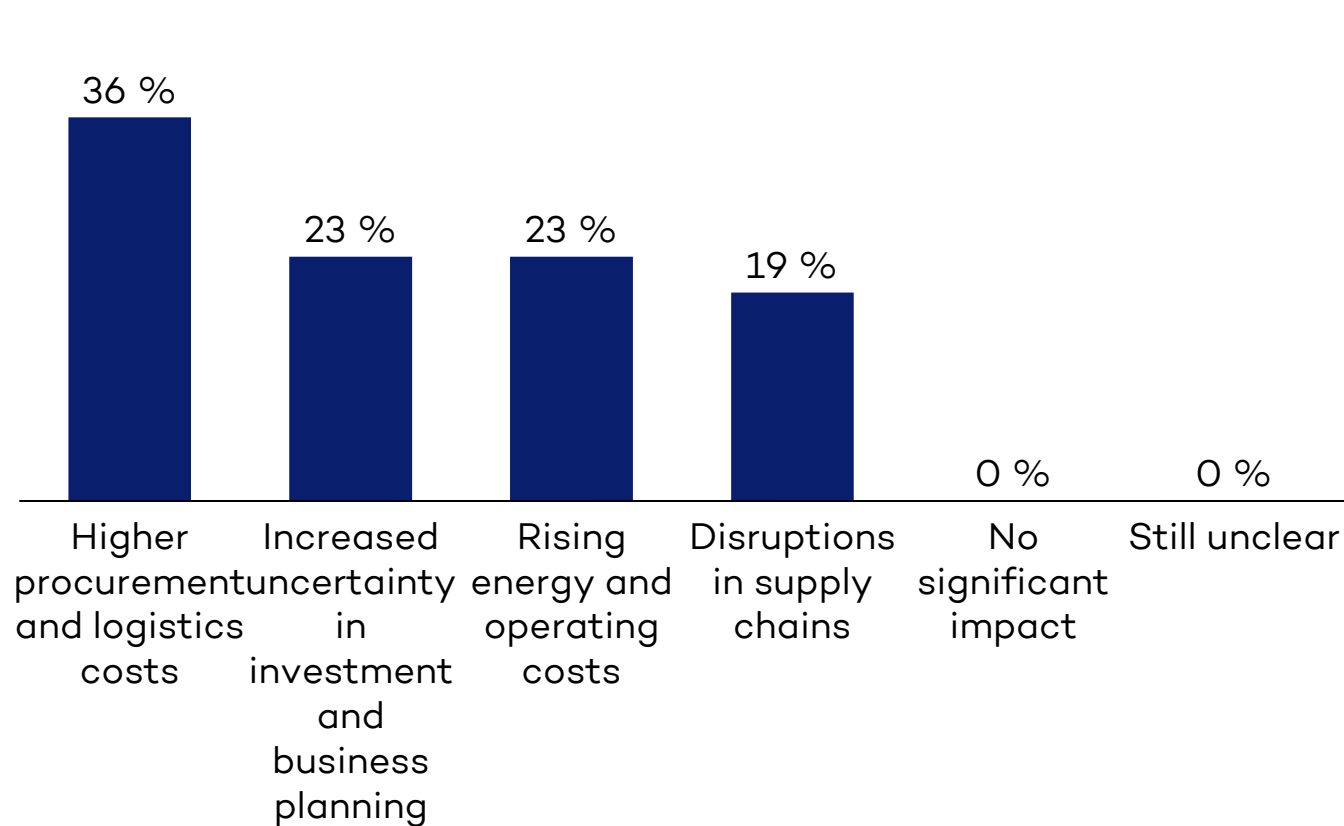


- Mechanical and plant engineering
- Automotive
- Chemicals / process industry
- Electronics / high-tech
- Defence / aerospace
- Other industrial sector



FLASH SURVEY

Which impacts do you expect to be most significant over the next 12 months?



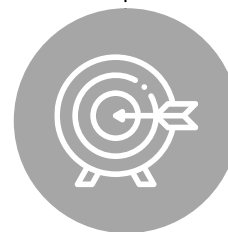
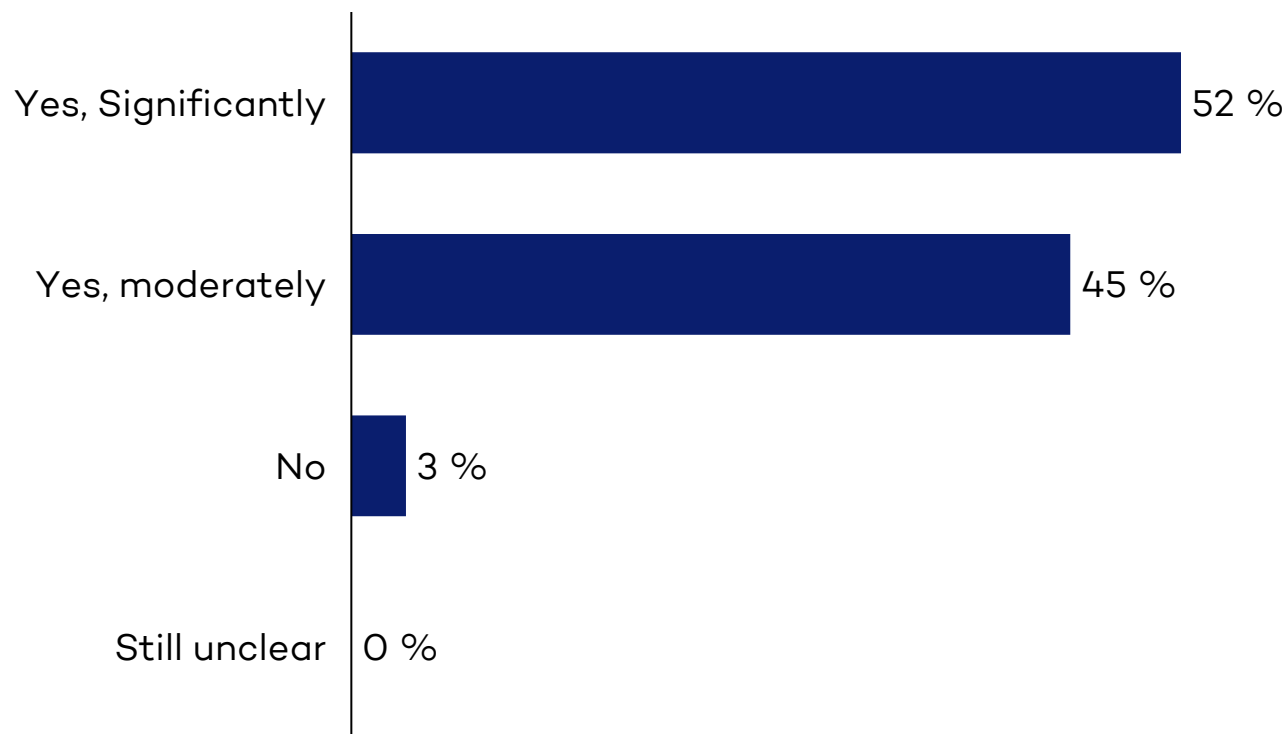
Cost pressure clearly outweighs classic supply chain disruption as the most prominent expected impact.

Uncertainty in investment and business planning is a major issue, indicating hesitation in decision-making.

The results suggest that companies are currently more concerned about cost and planning volatility than about pure availability risk.

FLASH SURVEY

If you expect rising energy and operating costs for your company due to the current escalation, how significant will they be?



Rising costs are no longer a niche concern, but a **broad-based management issue** across industrial companies.

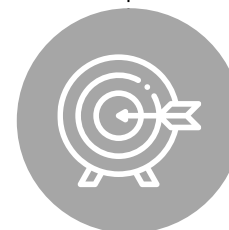
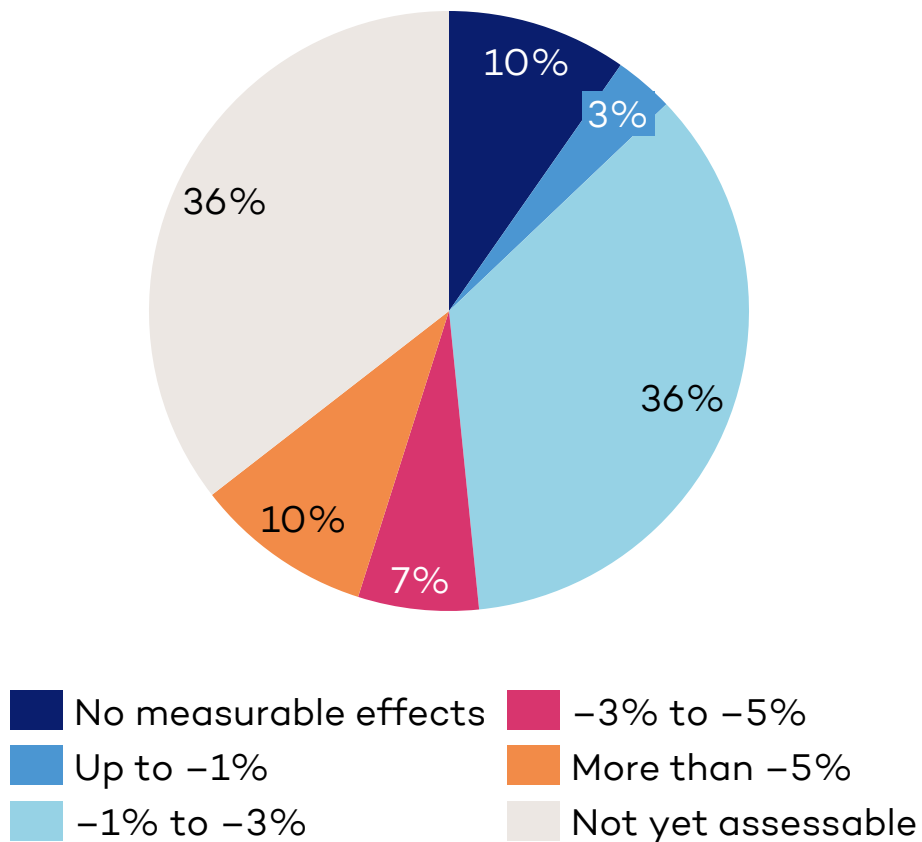
The high share of companies expecting significant cost increases points to direct pressure on margins and performance.

For procurement leaders, the key challenge is no longer only cost awareness, but **rapid translation into quantified action.**

Around 95% expect rising costs

FLASH SURVEY

What EBITDA impact do you expect for your company over the next 12 months?



Margin pressure is already visible, with many companies expecting EBITDA decline over the next 12 months.

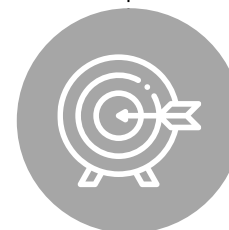
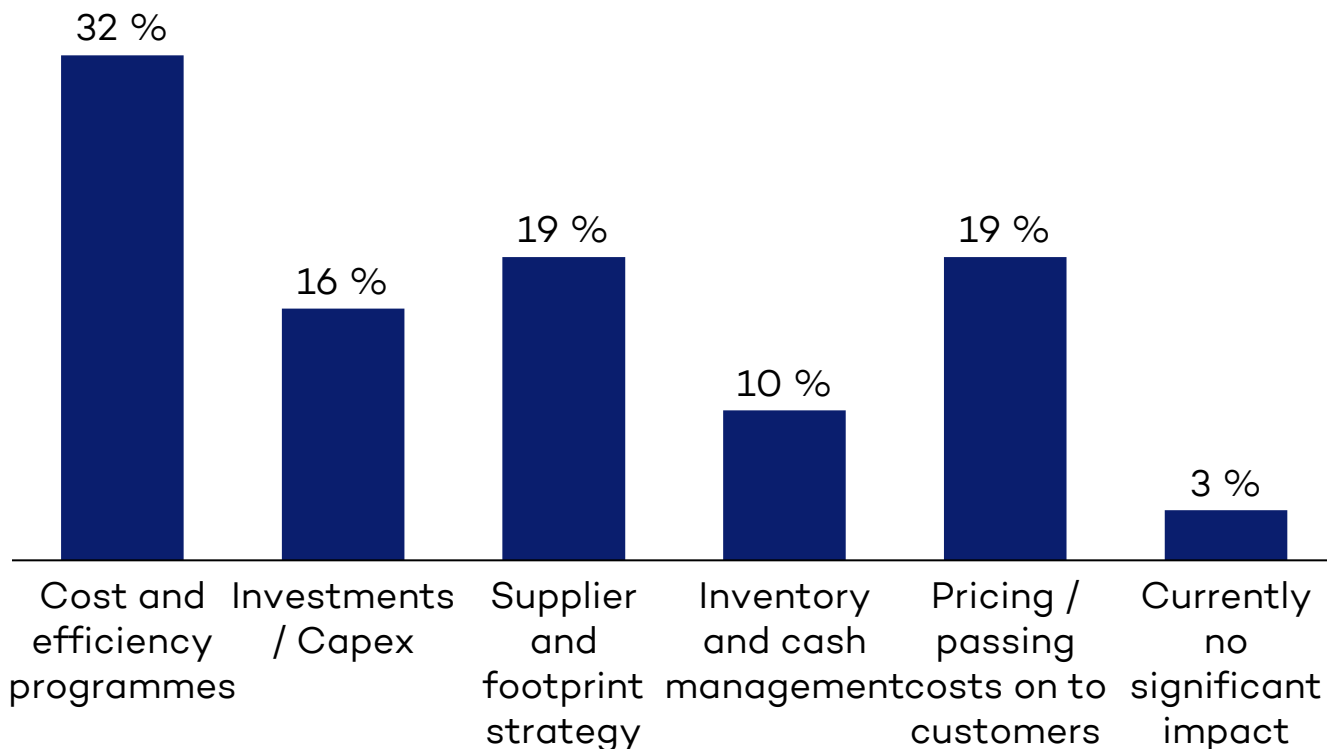
The most important finding, however, is that **36% cannot yet quantify the financial impact** at all.

This indicates a clear transparency gap: for many organisations, geopolitical exposure is recognised but not yet translated into decision-ready financial insight.

The **electronics and high-tech sectors** showed a particularly high degree of uncertainty regarding EBITDA.

FLASH SURVEY

Which business decisions are currently most affected?



Most companies are responding with defensive measures, especially **cost and efficiency programmes**.

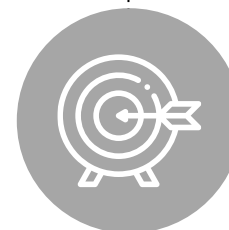
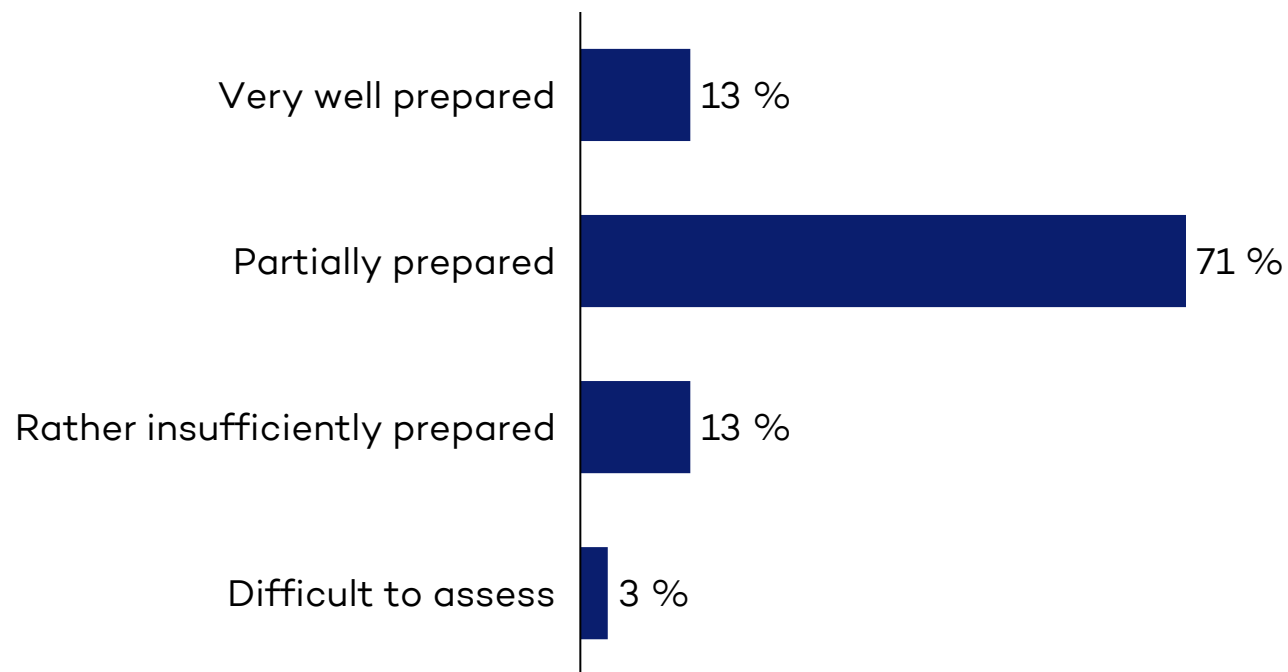
Pricing, supplier and footprint decisions show that margin protection is already driving **management action**.

Automotive prioritises supplier and footprint strategy, while mechanical and plant engineering shows greater willingness to invest.

So what for CPOs: Move from reactive cost defence to targeted supplier, footprint and resilience decisions

FLASH SURVEY

How well is your company currently prepared for potential geopolitically driven cost or supply chain risks?




Most organisations do not consider themselves fully prepared for geopolitically driven cost and supply chain risks.

The dominant answer is partial preparedness, indicating that resilience capabilities remain incomplete.

This gap between awareness and readiness suggests an execution challenge rather than a lack of risk recognition.

Only a small minority feels very well prepared

From Cost Pressure to Structural Response – Industry Patterns



Cost pressure affects all industries, but response strategies differ significantly

- **Automotive**

Strong focus on supplier and footprint strategies, indicating a shift towards structural adjustments.

- **Mechanical & plant engineering**

Investment and capacity decisions are more strongly affected, reflecting sensitivity to demand volatility.

- **Electronics & high-tech**

Higher uncertainty in EBITDA impact assessment, pointing to limited financial visibility.

- **Chemicals & process industries**

Particularly high exposure to cost pressure, especially driven by energy and input factors.

FLASH SURVEY

Implications for CPOs

**Quantify exposure fast**

Build end-to-end transparency on cost drivers across procurement, logistics and energy to translate geopolitical risks into measurable EBITDA impact.

**Protect margins with targeted action**

Combine cost-down initiatives, pricing levers and contract management with active working capital steering to stabilise short-term performance.

**Strengthen structural resilience**

Prioritise supplier, footprint and sourcing decisions based on risk exposure to reduce dependency and increase flexibility in critical areas.

**Close the execution gap**

Move from general awareness to clear ownership, scenario-based decision-making and measurable readiness across procurement and supply chain functions.

FLASH SURVEY

Takeaway

Geopolitical risk is no longer new, but its **financial impact** is becoming increasingly difficult to manage.

Rising cost pressure, limited transparency and gaps in preparedness are creating a structural challenge for organisations across industries.

Leading organisations are moving beyond awareness and **focusing on execution**:

- Creating real-time transparency on cost drivers and categories
- Linking procurement decisions directly to financial impact
- Shifting from reactive sourcing to proactive scenario planning
- Strengthening resilience across suppliers and footprint
- Establishing clear governance and ownership

Competitive advantage will depend on **the ability to turn uncertainty into structured, data-driven decision-making** and consistent execution.



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