LogiSYM

The Magazine for Supply Chain Executives

MARCH 2026

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FROM SHOCK ABSORPTION TO STRATEGIC ADVANTAGE: RESILIENCE AND SCENARIO PLANNING IN MODERN LOGISTICS

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The Logistics & Supply Chain Management Society
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The Official Journal of The Logistics & Supply Chain Management Society



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EDITORIAL MESSAGE

From the Editor

Resilience. Scenario planning. Proactive risk management. These aren't new phrases – they have been circulating in our industry for years. But here's the uncomfortable truth: for most of us, they remain talking points rather than action plans.

Sean Culey put his finger on it recently during the Dun & Bradstreet Power of Data Podcast when he observed that too many people in our industry are busy describing the world as it is - cataloguing disruptions, mapping risks, narrating the chaos - without ever getting to the question that actually matters: "So what do I do as a result of that? What action should I take? How do I change my business?"

That challenge sits at the heart of this edition.

We are proud to introduce a number of first-time contributors from around the globe, and we thank each of them for their generous time and preparation of content. From Australia, Dr. Stephen McGee shares his insights in "From Shock Absorption to Strategic Advantage: Resilience and Scenario Planning in Modern Logistics." From South Africa, Letitia Davids provides visibility of a rarely discussed dimension in "The Eclipse Effect: A Rare Glimpse into Illicit Alcohol and Supply Chain Resilience." From Europe, Dr. Frank Binder shares his thought-provoking article "Preparing our Supply Chains for a More Risky World." From Singapore, Jason Kristofer tackles the rising risks of cargo crime in "An Era of Fast Evolution and Innovation: Utilizing Modern Resources as a Strategic Advantage." And from the US, Evan Armstrong returns to provide a detailed analysis of "Resilience in the Global 3PL Market."

What connects every one of these pieces is that none of them stop at description. Each author has gone beyond the “what” and wrestled with the “so what” — and more importantly, the what now. That is exactly the shift logistics and supply chain industry needs.

Enjoy the read — and ask yourself Sean Culey's question. The answer might just reshape how you run your enterprise.

Brett Marshall
Editor-In-Chief
LogiSYM Magazine



LSCMS PRESIDENT'S MESSAGE

The Sunset of the "Neutral Hub": A 2026 Reality Check

In the logistics world, silence isn't a strategy. It's a surrender. When the Gulf conflict reignited and fuel markets went into a tailspin, the Logistics & Supply Chain Management Society (LSCMS) did not wait for a consensus that wasn't coming. We were the only body in Singapore to release a formal advisory on fuel surcharges. Why? Because our members do not have the luxury of waiting and seeing while their margins evaporate. Looking past the surcharges, we need to have a blunt conversation about the tectonic shifts rendering the old Singapore model obsolete.

The Energy War is a Supply Chain War

Some experts are saying that the systematic pressure recently placed on Venezuela and currently on Iran is not just diplomacy. It is a targeted strike on the energy arteries feeding the world's manufacturing heart. By squeezing these taps, the objective is to choke the very integrated ecosystem that China has spent decades building. As a Logistician, we leave the geopolitical posturing to the experts. We focus on the movement of goods but here is the bitter irony. While the giants fight over fuel, traditional "Global Hubs"—specifically Singapore —are being caught in the crossfire.

The Wake-Up Call

Singapore is losing its significance because we are still clinging to a transit hub playbook written in the 1990s. We are watching a maritime monopoly take hold while we struggle with administrative inertia. The LSCMS advisory was more than just a note on fuel; it was a signal. It was a reminder that in a world where supply chains are being weaponised, business as usual is a slow-motion catastrophe.

The map of global trade is being redrawn in 2026. If we do not pick up the pen and start drawing ourselves back into the narrative, we will find ourselves relegated to the footnotes of maritime history.

Are we ready to lead the conversation, or are we content to just watch the ships pass us by?

Raymon Krishnan, FALA, FCILT, CLP

President The Logistics & Supply Chain Management Society

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From Shock Absorption to Strategic Advantage: Resilience and Scenario Planning in Modern Logistics

Feature Article By Dr. Stephen McGee, Global Security and Resilience Leader

For much of the past decade, logistics and supply chain networks have been relentlessly optimised for efficiency. Inventory buffers were reduced, processes streamlined, and assets increasingly connected to maximise speed, visibility, and cost control. In stable conditions, these approaches delivered clear benefits. However, recent years have exposed a critical limitation: efficiency alone does not equal resilience. Across regional and global logistics networks, disruption is no longer an exception.

Geopolitical tension, climate volatility, cyber intrusion, security incidents, and operational failures increasingly intersect, often simultaneously. The challenge for logistics leaders is no longer how to prevent disruption entirely, but how to operate decisively and coherently when disruption occurs. This shift has significant implications for how organisations think about risk, planning, and leadership.

A CONVERGING RISK LANDSCAPE

Modern supply chains operate within highly interconnected ecosystems. Ports, warehouses, transport fleets, suppliers, data platforms, and third-party service providers are now tightly coupled. When disruption occurs in one node, its effects propagate rapidly across the network.

Geopolitical developments can restrict trade routes or introduce regulatory friction with little warning. Climate-driven events can shut down ports, damage infrastructure, or disrupt last-mile delivery.

Physical security incidents may halt operations, while cyber-attacks can disable automation systems, corrupt data, or sever communications across multiple locations. Critically, these risks rarely occur in isolation. They compound. A cyber incident during a severe weather event, a security issue during a period of geopolitical tension, or a supplier failure triggered by regulatory change can quickly escalate from a local issue to a regional or global disruption. In this environment, traditional approaches to risk management are increasingly strained.



WHY TRADITIONAL RISK MANAGEMENT FALLS SHORT

Many organisations continue to rely on static risk registers, periodic reviews, and compliance-driven frameworks. While these tools remain useful, they are poorly suited to environments characterised by speed, complexity, and uncertainty. Static assessments assume relative stability. They categorise risks, assign likelihoods, and define controls based largely on historical data. Yet many of the most disruptive events facing logistics today are novel, fast-moving, or driven by external forces beyond organisational control.

Leadership research consistently indicates that although organisations acknowledge converging risks, responsibility for those risks often remains fragmented. Cyber, physical security, operational continuity, and third-party risk are frequently managed in separate silos. When disruption occurs, this fragmentation delays decision-making precisely when clarity and speed are most critical. The issue is rarely a lack of plans. It is a lack of preparedness at leadership level.

"In modern logistics, resilience is no longer defensive; it is the ability to make confident decisions and build anti-fragile systems as geopolitical, cyber, and operational risks converge."

SCENARIO PLANNING AS A LEADERSHIP DISCIPLINE

Scenario-based planning is often misunderstood. In many organisations, it is treated as a procedural requirement, an exercise conducted to satisfy auditors, regulators, or governance committees. Scenarios are documented, reviewed periodically, and archived. In high-performing logistics organisations, scenario planning plays a very different role. It is not about predicting the future; it is about preparing leaders to make decisions under uncertainty.

Effective scenario planning tests assumptions rather than assets. It asks difficult but necessary questions:

- What happens if multiple disruptions occur simultaneously?
- What if critical data systems are unavailable during a physical incident?
- What if suppliers fail while regulatory constraints limit alternatives?

These exercises expose dependencies, decision bottlenecks, and governance gaps that rarely surface in traditional risk assessments. They also force senior leaders to confront trade-offs in advance, between speed and safety, cost and continuity, autonomy and central control. Importantly, scenario planning only delivers value when it actively involves leaders with decision-making authority. Exercises delegated too far down the organisation may be technically sound but operationally irrelevant. Leadership engagement transforms scenarios from documents into decision rehearsals.

FROM RISK ANALYTICS TO INFORMED JUDGMENT

Advances in risk analytics, predictive modelling, and real-time monitoring have dramatically improved visibility across supply chains. Sensors, dashboards, and data platforms now provide unprecedented insight into asset location, performance, and emerging threats. These capabilities are essential, but they are not sufficient. Data does not make decisions; people do. Over-reliance on analytics can create a false sense of precision, particularly in complex, fast-moving situations where data may be incomplete, delayed, or contradictory.





Leadership research highlights that experienced decision-makers rely not only on data, but on judgment shaped by experience, pattern recognition, and cross functional trust.
The most resilient organisations integrate analytics with scenario-based judgment. Data informs options; scenarios test consequences; leaders decide. This balance enables faster, more confident action when conditions deteriorate.

CYBER RISK AS A FRONT-LINE OPERATIONAL THREAT

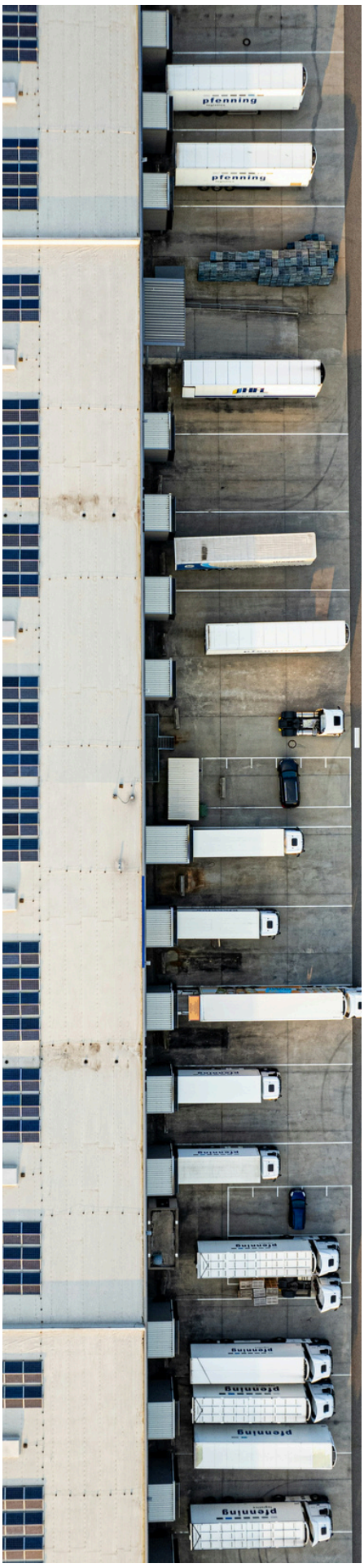
Nowhere is risk convergence more evident than in cyber exposure. As logistics networks digitise, cyber threats increasingly translate directly into operational disruption. Connected fleets, automated warehouses, port management systems, and supplier platforms have significantly expanded the attack surface.

A cyber incident can halt physical operations, compromise safety, disrupt contractual obligations, and damage trust with customers and regulators, all without a single asset being physically damaged. Treating cyber risk as a purely technical issue is no longer viable. It is an operational, safety, and continuity issue. Organisations that manage cyber risk effectively assign clear senior ownership and integrate cyber scenarios into broader resilience planning, rather than isolating them within IT or specialist security functions. This integrated approach clarifies accountability and reduces confusion when rapid decisions are required.

THE ROLE OF BOUNDARY-SPANNING LEADERSHIP

Resilience in logistics does not sit neatly within a single function. It spans operations, technology, risk, legal, procurement, and external partners. Leadership research consistently shows that effective resilience depends on boundary-spanning capability, the ability to translate risk across technical, operational, and executive domains.

Leaders who can connect information horizontally across the organisation enable faster coordination, clearer communication, and more coherent responses under pressure. They ensure that scenario outcomes influence investment decisions, supplier

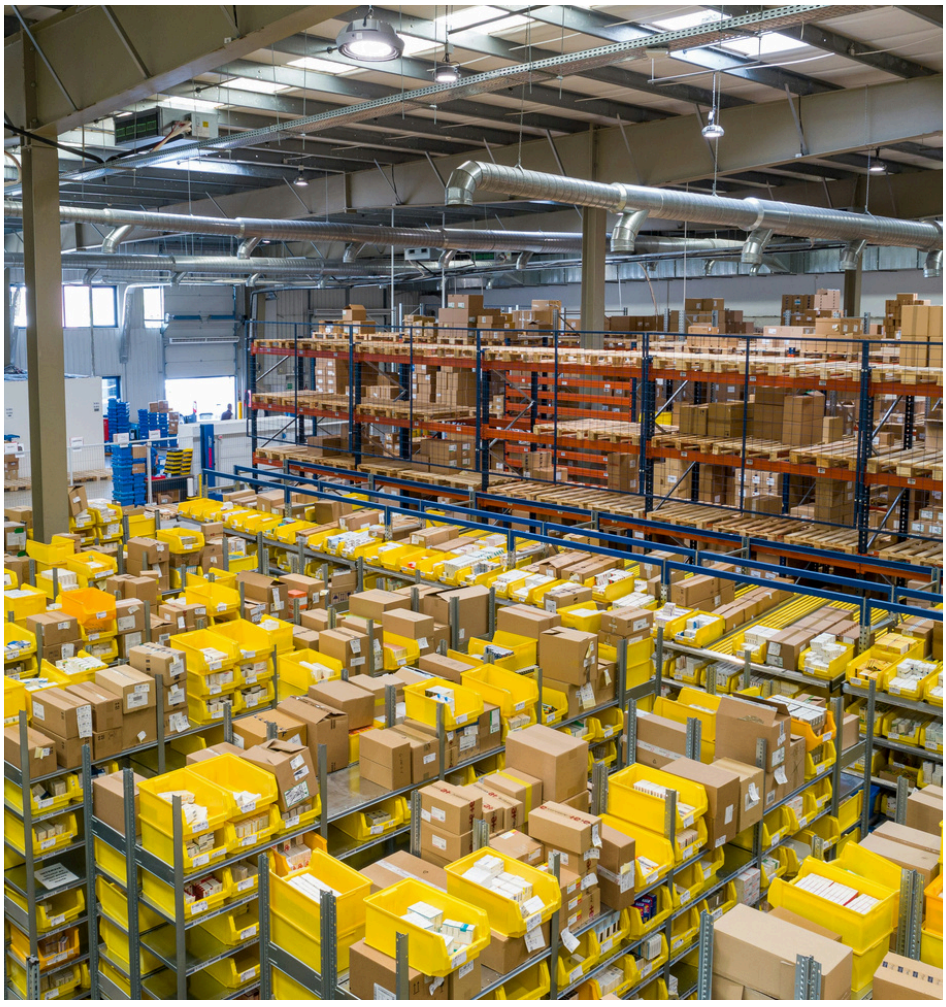


design, not just emergency plans. In practice, this means resilience must be embedded into governance rather than bolted on as a specialist function. strategies, and operational

DESIGNING FOR UNCERTAINTY

Resilience is often described as the ability to “bounce back.” For logistics leaders, a more useful definition is the ability to absorb shock, adapt quickly, and continue operating with intent. This capability does not emerge from plans alone. It is designed through leadership engagement, tested through scenarios, informed by analytics, and reinforced by organisational culture. Organisations that invest in these disciplines gain more than continuity; they gain confidence in decision-making when conditions are unclear.

As supply chains become more connected and risks more intertwined, resilience will increasingly differentiate leaders from laggards. Those who treat it as a strategic and operational discipline rather than a contingency will be better positioned to navigate disruption and sustain performance in an uncertain world.





Dr. Stephen McGee

Global Security & Resilience Leader

Dr. Stephen McGee is a global security and resilience leader with more than 25 years’ experience managing security, risk, and crisis management across international organisations.

His work focuses on how organisations translate risk intelligence into operational decision-making in complex environments, particularly across logistics, supply chains, and critical infrastructure. Stephen writes and speaks on risk convergence, organisational resilience, and leadership in uncertain operating environments.

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The Eclipse Effect: A Rare Glimpse into Illicit Alcohol and Supply Chain Resilience

Feature Article By Letitia Davids, Anti-Counterfeit Specialist, Certified Internal Auditor (CIA)

The illicit liquor trade in South Africa is more than a criminal justice or public health issue; it is a supply chain resilience failure playing out in real time. Illicit trade extends beyond counterfeiting to include smuggling, tax leakage, artisanal or informal production entering commercial channels, surrogate alcohol, and other parallel market activities bypassing formal distribution networks.

Market shocks such as alcohol sales bans during Covid 19 lockdown, restraints within enforcement, economic pressure, and porous borders have created supply gaps that illicit operators rapidly exploit. From a resilience perspective, the illicit liquor economy reveals what happens when supply chains fracture under stress.

Illicit alcohol introduces severe risk into the system:

- **Public health hazards:** Counterfeit products often contain toxic substances and can cause serious health issues.
- **Revenue leakage:** Billions in lost tax revenue weaken state capacity and distort competitive markets.
- **Brand erosion:** Legitimate manufacturers suffer reputational harm and loss of consumer trust.
- **Criminal infiltration:** Organised crime networks embed themselves into distribution ecosystems.
- **Market destabilisation:** Informal and illegal businesses displace compliant operators.



In short, illicit trade thrives where visibility, enforcement, coordination, and traceability fail, the very dimensions that define supply chain resilience.

LOCAL LESSONS FOR RESILIENT SUPPLY CHAIN

Resilience has become a defining leadership competency. As geopolitical tension, climate volatility, cyber threats, and logistics disruptions reshape global trade, organisations are investing in scenario planning, digital monitoring, and risk frameworks. Yet some of the most instructive lessons come not from global modelling, but from localised breakdowns. South Africa's counterfeit alcohol challenge offers powerful insight into the following:

Supply Gaps Create Shadow Markets

When legal supply is restricted, whether through regulation, disruption, or crisis, illicit networks move quickly to fill the void. Resilience must include continuity planning that prevents demand shocks from feeding illegal supply.

Multi-Stakeholder Coordination is essential.

No single entity can combat illicit trade alone. Industry, law

enforcement, regulators, and customs authorities must function as an integrated network. Fragmentation creates opportunity for criminal actors.

Data is the Foundation of enforcement.

Intelligence-led investigations, structured reporting tools, and centralised profiling databases convert scattered observations into actionable insight. Without structured information flow, enforcement remains reactive.

Legal Frameworks Must Enable Rapid Disruption

Strong penalties, asset forfeiture, and coordinated prosecution make illicit trade less attractive and riskier. Deterrence is part of resilience strategy.

The illicit alcohol ecosystem demonstrates that resilience is not only about recovering from disruption, but about preventing systemic exploitation.

FROM INVESTIGATION TO CONVICTION – A RESILIENCE LENS

Combating illicit trade requires a structured, end-to-end approach. When viewed through a supply chain resilience framework, each step strengthens system integrity.

Intelligence and Market Assessment

Market assessments serve as diagnostic tools, evaluating the health and integrity of the trading environment while identifying priority risk nodes within the supply chain. Rather than simply scanning for non-compliance, these assessments analyse how and where illicit products may be penetrating formal distribution systems.

Targeted outlet inspections enable authorities and industry to:

- Detect suspect or non-compliant products.
- Secure admissible evidence
- Conduct controlled test purchases to trace product flow.
- Map distribution pathways and trading patterns.
- Identify upstream suppliers and potential aggregation points.

Liquor licensing authorities play a critical frontline role, functioning as early warning sensors within the commercial ecosystem. Structured tools enhance data accuracy, consistency, and inter-agency communication, enabling coordinated intervention.

Resilience insight: Early detection at market level limits systemic contamination and protects legitimate supply networks.

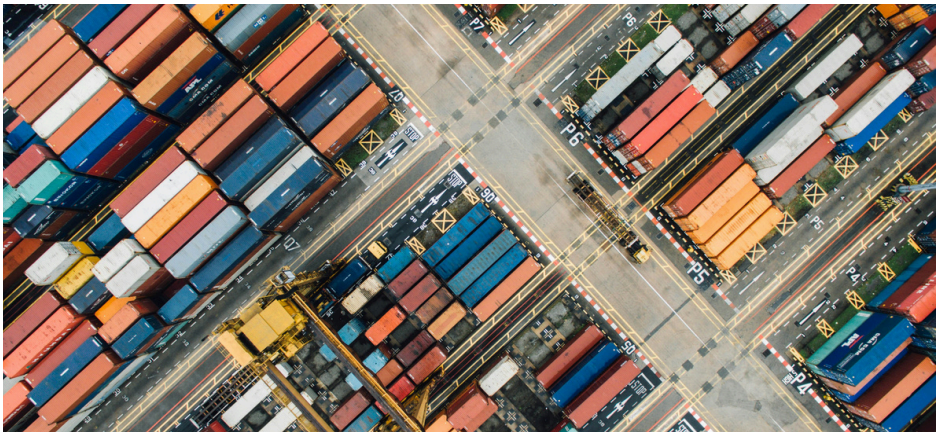
Focused Investigations

Once targets are identified, the emphasis shifts from isolated infractions to analysing points of supply chain penetration. Structured operational and evidentiary reports:

- Generate actionable supply chain intelligence
- Map upstream suppliers
- Identify intermediary distribution nodes
- Detect recurring trade patterns
- Expose parallel networks operating alongside legitimate commerce

This approach shifts enforcement from reactive seizures to proactive supply chain risk mitigation.

Resilience insight: Precision and rigour at the investigative stage reduce downstream legal failure and prevent recurring exploitation.





Advanced Investigation and Risk Analysis

As investigations mature, the emphasis shifts toward deeper structural analysis of the supply ecosystem. Further investigative actions may include:

- Expanding and reinforcing due diligence
- Comprehensive supply chain mapping
- Source verification and downstream distribution analysis
- Identification of additional statutory and regulatory breaches
- Development of geographic and transactional heat maps
- Proactive risk assessments

Pre-operation legal summaries ensure interventions are precise and strategically disruptive.

Resilience insight: Governance driven intelligence aligns tactical enforcement with systemic risk mitigation.

Profiling and Database Development

Systematic collation and centralisation of intelligence enable:

- Structured suspect databases
- Pattern recognition and anomaly detection
- Identification of recurring networks
- Cross-case linkages

This transforms enforcement from reactive raids into proactive network disruption.

Resilience insight: Information centralisation strengthens systemic awareness.

Prosecution, Sentencing and Asset Recovery

Resilience requires credible consequences. Strong penalties and asset forfeiture:

- Increase operational risk for illicit actors
- Disrupt criminal financing
- Deter repeat violations
- Reinforce market confidence

Resilience insight: Consistent enforcement credibility stabilises market systems.

ROLE PLAYERS: BUILDING A RESILIENCE NETWORK

Effective disruption depends on coordinated engagement across:

- Government regulators
- Law enforcement agencies
- Liquor licensing authorities
- Customs and border officials
- Industry bodies and brand owners
- International enforcement counterparts

A supply chain is only as strong as its weakest institutional link. Resilience is constructed through networked governance, shared accountability, and sustained cooperation.

TRAINING AND CAPACITY BUILDING

Training in illicit trade detection, trademark protection, intellectual property enforcement, and legislative application is not a supplementary compliance activity, it is a core resilience function. In complex supply



chains, frontline actors serve as distributed risk sensors. Their ability to recognise counterfeit indicators, identify diversion patterns, understand statutory offences, and preserve admissible evidence determines how quickly vulnerabilities are detected and contained. Without consistent and structured training, enforcement remains reactive, fragmented, and procedurally vulnerable. With it, detection becomes earlier, intelligence becomes sharper, prosecutions become stronger, and systemic gaps are closed before they scale.

Legislative literacy reduces operational error; trademark and IP awareness strengthens brand integrity; and cross-sector exercises improve coordination across agencies and industry. Training converts human capability into structural defence. It shortens response time, strengthens deterrence credibility, enhances information quality, and reinforces supply chain integrity from the point of entry to final distribution. A system is only as resilient as the knowledge embedded within it.

Legislative Framework as Structural Reinforcement

South Africa's regulatory framework governs production, distribution, licensing, and enforcement while criminalising smuggling and counterfeiting. Familiarity with legislation ensures:

- Identification of multiple offences
- Stronger prosecution strategies
- Reduced procedural vulnerabilities
- Higher conviction rates

Resilience insight:
Regulation is not friction; it is structural scaffolding.

CONCLUSION: ILLICIT TRADE AS A RESILIENCE STRESS TEST

Supply chains are compromised when:

- Enforcement weakens
- Visibility decline
- Stakeholders operate in isolation
- Economic shocks create demand imbalances

Resilience is strengthened through:

- Intelligence-led enforcement
- Coordinated stakeholder action
- Credible legal consequences
- Training and capacity building
- Robust regulatory frameworks

Local illicit trade challenges are systemic stress tests. Resilience is not merely the ability to recover from disruption. It is the deliberate design of systems that are difficult to infiltrate, resistant to exploitation, and capable of adapting before vulnerabilities become crises.



Letitia Davids

Anti-Counterfeit Specialist, Certified Internal Auditor (CIA)

Letitia Davids is a Certified Internal Auditor (CIA) and an Illicit Trade and Anti-Counterfeit Specialist with expertise in risk management, forensic investigations, regulatory compliance, and intellectual property protection. With over 12 years of experience in the FMCG sector and a deep-rooted passion she has become a formidable advocate in the fight against illicit trade.

Throughout her career, Letitia has worked extensively on identifying and mitigating risks within complex supply chains, supporting investigations into illicit and counterfeit goods, and strengthening collaboration between industry, regulators, and law enforcement agencies.

Her work focuses on protecting legitimate markets, safeguarding consumers, and supporting stronger enforcement mechanisms against illicit trade. She is actively involved in initiatives aimed at combating illicit and counterfeit products, contributing to strategic discussions, policy development, and operational frameworks that support enforcement and regulatory efforts across the sector.

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Preparing our Supply Chains for a More Risky World

Feature Article by Dr. Frank Binder, Managing Director, GSCA | Global Supply Chain Advisors

We are seeing examples of Supply Chain disruptions all around us these days – wars that block shipping chokepoints and closes off entire regions' airspace, sanctions that cut off suppliers, pirates that hijack container ships, droughts that reduce the capacity of crucial waterways; and pandemics that bring economies to a standstill.

Such events are often labeled "Black Swans", implying they were rare and thus surprising, but in fact many of these disruptions could have well been anticipated. For example, a global pandemic outbreak had been predicted with high confidence by experts, and even played out in two major Hollywood movies.

Many of these risks are driven by geopolitical events, by state and non-state actors, and by now we all should have recognized that our world has changed, increasing the risk levels for disruptions of all kinds. It seems wishful thinking that we are going back to quieter, more predictable times anytime soon. As Supply Chain professionals, we must react to this increased risk level, by anticipating risks and making our Supply Chain more resilient.

When a disruption happens, we should not be making excuses ("Nobody thought this would happen…"), but instead we must continue to deliver products to our customers, at sustainable costs, making sure our business survives, and maybe even thrives, if ability to supply becomes a competitive advantage. In the past, we have focused our supplier risk assessments on financial stability, and on site specific risks such as fires, earthquakes etc. Now we need to look at geography and politics related risks and operational threats, too.

The first step is to draw a Supply Chain Map – your facilities and your first- and lower tier suppliers facilities are the nodes, the shipping routes are the links between them. You need to ensure that any critical components that are not easily replaced, are mapped, no matter what tier they correspond to.



Shortage of one component could even affect multiple supply chains at once. For example, during the COVID pandemic, one of the major issues I came across was the supply of specific filters used in the manufacturing process, that suddenly were in high demand for vaccine production, too.

A relatively mundane (but, crucially, not totally mundane) consumable suddenly became critical, and multiple pharmaceutical companies found their production at risk of stoppage due to shortage of these same filters. Out of a systematic risk analysis along your supply chain map, assessing every node and link with a suitable framework (eg, the PESTLE methodology for external risks), you can create a risk matrix that classifies all identified risks according to probability and impact.

Then, you develop risk mitigation for those risks that have a too high probability or impact, or both. One category of risk that deserves specific attention is Cyber Risk. A cyberattack can be just as devastating as a physical event, and arguably harder to anticipate. Just consider the impact when your ERP system goes down because of a ransomware attack: Suddenly, you cannot process purchase orders, you have no visibility on inventory, your warehouse management system is offline, and your planning team is effectively blind; you are forced to switch back to manual, Excel based processes, and later painfully update your ERP once it is operational again.

This is not hypothetical; in 2017, the NotPetya attack hit Maersk and brought their entire operations to a standstill for weeks, at an estimated cost of $300 million. Cyberattacks can also target the shared infrastructure that your supply chain depends on. Port operating systems, customs platforms, air cargo booking systems all are single points of failure, that affect hundreds of companies simultaneously.

A cyberattack on a major port's terminal operating system can shut down container handling, immediately creating a chokepoint. The attack on the Port of Nagoya in 2023 demonstrated exactly this, halting container operations at Japan's largest port for several days. Cyber risk therefore needs to be explicitly included in your supply chain risk map, both at the node level (your own and your key suppliers' IT systems) and at the infrastructure level (shared platforms that multiple supply chain actors depend on). You need to understand the cyber resilience of the critical systems around you, as our digital assets become more and more interconnected. In practice, many external risks are outside your control, so risk mitigation leads you logically towards a Resilience framework.

Resilience means ensuring that your Supply Chain continues to function, after any disruption has eg disabled suppliers or blocked shipping lanes - regardless of whether that disruption had been anticipated or not. Setting up an alternate shipping lane is relatively easy and quick, working together with your forwarders, and ideally using this alternate lane regularly, to make sure the process, documents etc are functional and compliant.

Dual Sourcing for products, intermediates and critical components is essential for mid to longer term resilience against disruptions that impact their supply, but this is more challenging to achieve than new shipping lanes. Often, there is no Dual Sourcing in place; eg, in





Pharmaceutical Supply Chains, there is often only one single site globally that makes a given product or intermediate. intermediate. It is often a long and expensive undertaking to develop and qualify alternative suppliers, and it will typically also lead to higher operational expenses. Todays Supply Chains were built in an era that was relatively stable and orderly, and therefore cost reduction by economies of scale was a key objective, ie concentrating production in few, or even one, factory globally.

However, as the world has become a more unstable and risky place, we need to revisit our Supply Chains, to increase resilience. You should proactively, regularly assess your supply chain resilience, by conducting simulations, ideally by deploying digital tools. In addition, AI tools can even enable rapid changes to operations, if a disruption happens. Scenario planning is one of the classical approaches, where you develop different scenarios such as the unavailability of a key supplier, and evaluate the supply situation short, mid and long term.

If your Advanced Planning System is capable of scenario planning, you can project the inventory development and detect shortages, testing whether your Supply Chain would still be functional, or where it breaks down. And with a Digital Twin of your Supply Chain, you can go further, for example simulate a port closure or failure of a supplier, and explore the dynamics of inventory after that event, determining the recovery time and other key indicators.

Such Digital Twins are more challenging to build (think Master Data quality, systems integration etc) and need to be kept up-to-date by feeding actual data into them, but they enable you to assess your resilience much better. Even more advanced, and more challenging to implement, are decision intelligence systems that could use AI agents to eg change purchase order and routings, if a disruption arises. These are very promising digital and emerging AI enabled systems, but the basis must be in any case that you have done the structural homework and





established alternatives throughout your supply chain, disruption happens. Otherwise, there's nothing these systems could adjust and reschedule in the first place. While resilience is business critical, the resources that a company can invest for this, are finite.

You should therefore develop a prioritized proposal, giving the company leadership transparency on how much money will achieve what amount of resilience and for which products, so they can make a decision, and accept residual risks of disruption for what is not covered by the investment. Typically, a resilience program will stretch over multiple years, as resources are constrained, and individual steps take time. Practically speaking, I would recommend to map your supply chain, immediately establish alternate shipping routes, and work on dual sourcing for your priority products with urgency. You should establish scenario planning capabilities, ideally with a planning system.

If you also build a Digital Twin of your Supply Chain, then in my opinion you are "leading edge" and have achieved important proactive risk analysis and Supply Chain simulation capabilities. Going further, eg implementing AI driven decision engines, might be "bleeding edge" at this point, but if you are able to implement such systems, it would add important response capabilities. The foundation, in any case, is Dual Sourcing for those products your company wants to build resilience for.





Dr. Frank Binder

Managing Director, GSCA | Global Supply Chain Advisors

Dr. Frank Binder is an experienced Supply Chain leader in the Life Sciences industry, passionate for building and transforming Supply Chains for pharmaceutical and biopharmaceutical companies, such as leading the global Supply Chain of Japanese pharma company Santen or the international Supply Chain of US Biopharma Celgene.

Currently, he is providing strategic advisory and consultancy with his own company, GSCA | Global Supply Chain Advisors. He has a broad and deep Supply Chain Management expertise, spanning chemical, biopharmaceutical and galenical production, planning, NPI, S&OP/IBP, international logistics, and distribution in multiple markets across continents.

He is regularly invited to speak at major industry conferences in Europe, USA and Asia as a recognized thought leader, and enjoys contributing to the advancement of the Pharmaceutical Supply Chain practice.

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Maersk's Vision: Building Reliability in an Uncertain Supply Chain

In a media briefing in Singapore last week, Elaine Low, Area Managing Director for South East Asia and Bhavan Vempati, Head of Asia Market, Ocean Product, outlined an ambitious goal: to become the world's best logistics company, defined by three pillars—quality, reliability, and sustainability.

In a global environment marked geopolitical tension, supply chain restructuring, and constant disruption, the company believes reliability across the entire logistics chain will become the most valuable differentiator. In a media briefing in Singapore last week, Elaine Low, Area Managing Director for South East Asia and Bhavan Vempati, Head of Asia Market, Ocean Product, outlined an ambitious goal: to become the world's best logistics company, defined by three pillars—quality, reliability, and sustainability.

In a global environment marked by geopolitical tension, supply chain restructuring, and constant disruption, the company believes reliability across the entire logistics chain will become the most valuable differentiator.

The network redesign also supports Maersk's broader transformation from a shipping line into an integrated logistics provider. Today the company is building capabilities that span ocean freight, terminals, landside transportation, air freight, and third-party logistics.

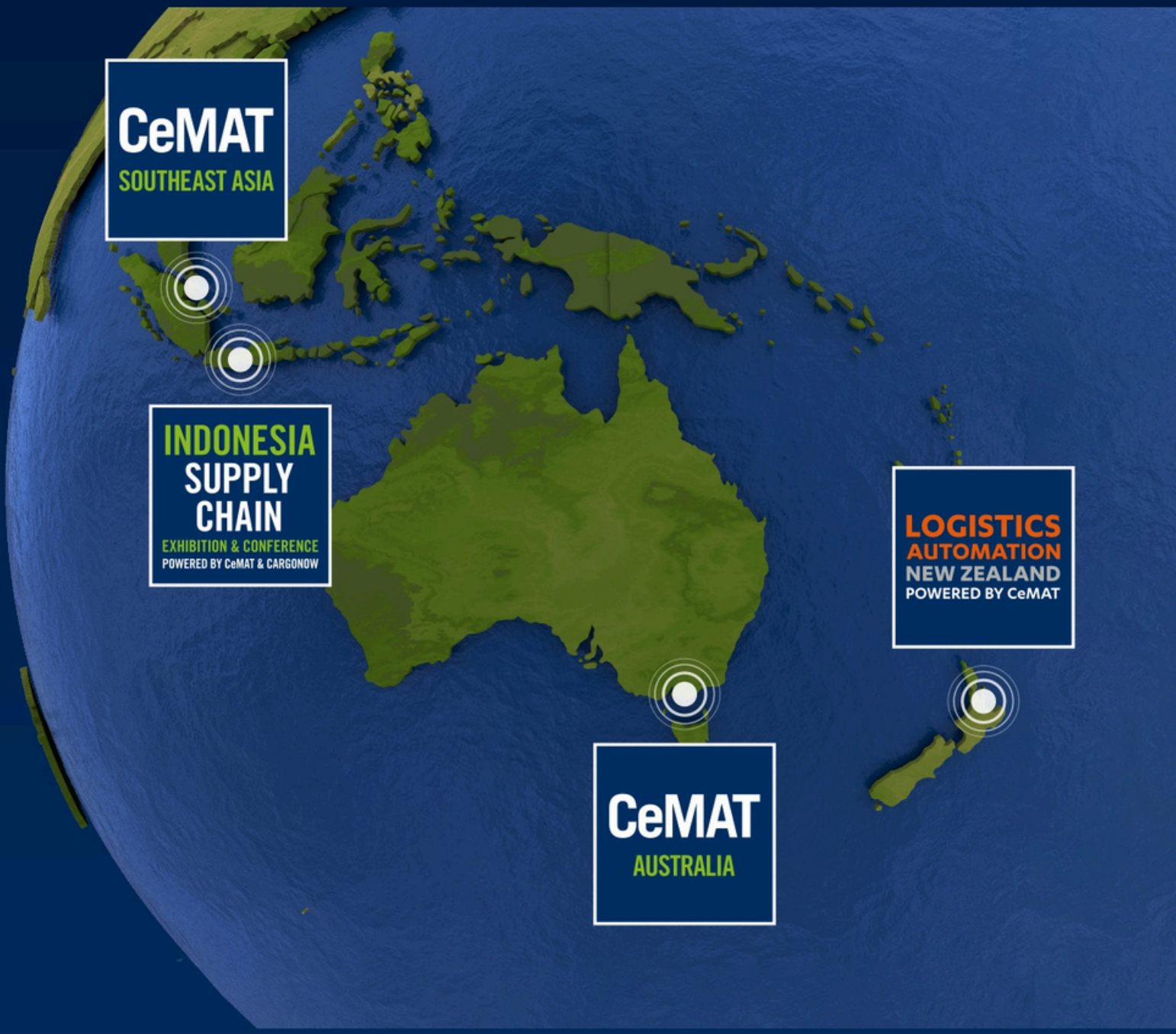
One visible example is the expansion of large-scale mega distribution centres in China, Malaysia, and Singapore, supporting both B2B distribution and B2C e-commerce fulfilment. These facilities integrate warehousing, distribution, and transport services into a single logistics platform capable of managing cargo flows from origin to final delivery. The strategy reflects deeper changes in global trade. Global trade growth continues to outpace GDP, driven partly by supply-chain diversification and geopolitical realignment.

MAERSK

Intra-Asia trade now represents roughly 25% of global trade, encompassing both raw materials and finished goods. At the same time, trade between countries in the Global South particularly



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Logistics Automation NZ	10–11 Nov 2026	Auckland Showgrounds, New Zealand	logisticsautomation.co.nz
Supply Chain Indonesia	25–27 Nov 2026	NICE, Jakarta, Indonesia	supplychainindo.com

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between China, Africa, and South America—is expanding at double-digit rates. These shifts are placing new pressure on logistics infrastructure, especially port terminals and inland transport networks. At the same time, the shipping industry is experiencing increased volatility. The traditional five-year shipping cycle has largely disappeared, replaced by shorter and more unpredictable “micro-cycles.” In such an environment, managing disruption has become a core capability.

Maersk emphasises operational flexibility and contingency planning to reduce the cost of disruptions for customers. Cargo flows, for example, can be redirected between regional hubs such as Port of Tanjung Pelepas in Malaysia and Singapore when necessary. Recent geopolitical tensions illustrate this challenge. Shipments through the Strait of Hormuz have been temporarily suspended in some cases, while operations through hubs such as Salalah in Oman continue.

General cargo shipments remain active, though some reefer shipments have been paused due to operational risk considerations. Asia remains central to the company’s growth strategy. Logistics demand across Southeast Asia and North Asia continues to expand rapidly, particularly in consumer markets such as the Philippines, where growth has been especially strong, with currently 97 distribution centers operating at almost full capacity.

Through its “One Maersk” strategy, the company is integrating services that historically operated separately—shipping, terminals, and logistics—into a single organisation focused on end-to-end supply chain solutions. In a world where disruption is increasingly permanent, Maersk’s strategy is clear: Build logistics networks designed not just for efficiency but for resilience and reliability.

MAERSK

Maersk is an integrated logistics company working to connect and simplify its customers’ supply chains. As a global leader in logistics services, the company operates in more than 130 countries and employs around 100,000 people. Maersk is aiming to reach net zero GHG emissions by 2040 across the entire business with new technologies, new vessels, and reduced GHG emissions fuels .*

**Maersk defines "reduced GHG emissions fuels" as fuels with at least 65% reductions in GHG emissions on a lifecycle basis compared to fossil of 94 g CO2e/M*





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Resilience in the Global 3PL Market

Feature Article By Evan Armstrong, Chief Executive Officer at Armstrong & Associates, Inc. (A&A)

In 2023, the Global Third-Party Logistics (3PL) Market experienced a downturn as rates and demand declined worldwide due to economic challenges and geopolitical instability. Revenue for global 3PL services fell significantly, primarily driven by weakness in International Transportation Management (ITM) and Transportation Management (TM). Falling transportation rates exacerbated declines in logistics costs (spend) and in 3PL revenues.

After a 21.6% drop in 3PL revenue for 2023, the global 3PL market began to stabilize throughout 2024. Armstrong & Associates, Inc. (A&A) estimates that the global 3PL market grew by 2.4% to $1.21 trillion in 2024, with an anticipated 5% growth in 2025, bringing it to $1.27 trillion. Furthermore, A&A estimates that global logistics spending decreased by 1.5% in 2023, dropping to $11.5 trillion.

With ongoing geopolitical tensions and uncertainties around tariffs and trade, global logistics spending is projected to grow by 5.2% to approximately $12.6 trillion in 2025. The global 3PL market is highly fragmented and underpenetrated, with abundant growth potential. Tariff uncertainty, trade policy changes, the COVID-19 pandemic, and other unprecedented supply chain disruptions in the Red Sea and the Panama Canal in recent years have accelerated the pace of outsourcing in global logistics.

3PL customers realized that supply chains need to be more flexible, and it's more beneficial to source products and components from multiple countries than just one. This uncertainty presents opportunities for Third-Party Logistics Providers (3PLs) to become strategic partners and offer valuable services while 3PL customers seek to mitigate risks. In addition, 3PLs help their customers save costs and offer specialized services, including expertise in international transportation management, warehousing, and distribution. The global logistics market remains a significant opportunity for 3PLs.

Global 3PL revenue in 2024 was 10.1% of total logistics spending, a slight increase from the 10% 3PL penetration rate in 2019.
We expect the global 3PL revenue penetration rate to remain stable between 2025 and 2026. A&A estimates global 3PL revenues will continue to grow, with 2026 expected to see a 4.9% increase to $1.35 trillion.



GLOBAL LOGISTICS COSTS & 3PL REVENUES

A&A's Global 3PL Market estimates are comprised of three major industry segments:

International Transportation Management (ITM): Third-party logistics providers offering international air and ocean transportation management services, typically managed under contracts. These services often include freight forwarding, warehousing, container freight station operations, trade compliance, customs brokerage, and inland shipment management.

Value-Added Warehousing and Distribution (VAWD): Third-party logistics providers offering long-term contract warehousing and distribution center management, and various value-added services. These contracts typically have terms ranging from 1 to 3 years, with some extending up to 10 years or more. VAWD does not include short-term "Public" warehousing.

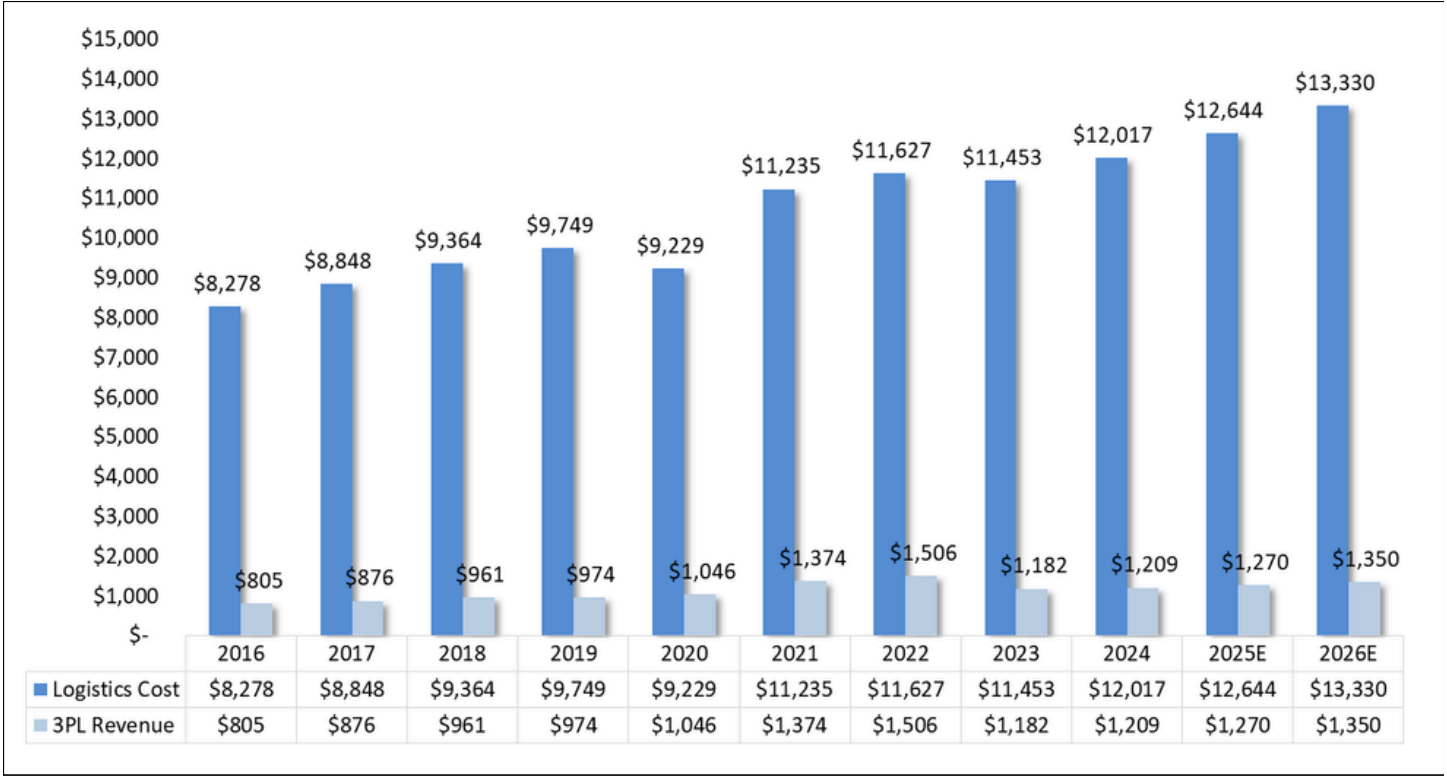
Transportation Management (TM) comprising Domestic Transportation Management (DTM) and Dedicated Contract Carriage (DCC):

DTM: Third-party logistics providers offering non-asset-based transportation management services, primarily focused on shipments originating from and destined for locations in North America.

These services are typically performed with freight brokerage and are governed mainly by contracts. The DTM sub-segments include Freight Brokerage, Intermodal, Managed Transportation, and Last-Mile Delivery.

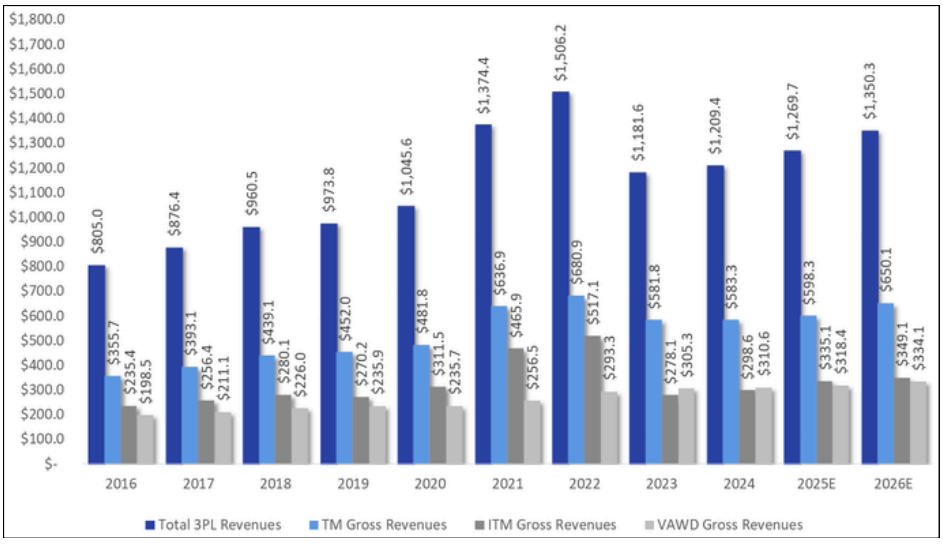
DCC: Third-party logistics providers offering dedicated contract carriage services to customers through agreements typically having one to seven-year terms. DCC operations primarily focus on managing asset-based truckload transportation. 3PLs supply drivers, transportation equipment, and management personnel as part of this service.

VAWD is the only 3PL segment to have posted positive growth in 2023, surpassing the ITM segment in revenue for the first time. The size of the global VAWD 3PL segment in 2024 was $310.6 billion, representing a stable Year-Over-Year (YOY) increase of 1.8% and a 31.7% increase over 2019, when the segment's gross revenue was $235.9 billion. The global VAWD market is expected to grow 2.5% in 2025, reaching $318.4 billion. The most significant impact currently stems from tariff and trade-war



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025E	2026E
Logistics Cost	$8,278	$8,848	$9,364	$9,749	$9,229	$11,235	$11,627	$11,453	$12,017	$12,644	$13,330
3PL Revenue	$805	$876	$961	$974	$1,046	$1,374	$1,506	$1,182	$1,209	$1,270	$1,350

Global Logistics Costs & 3PL Revenues



Greater China: China, Hong Kong SAR, Macao SAR, Taiwan SAR. ASEAN includes Brunei Darussalam, Myanmar (Burma), Lao P.D.R., Cambodia, Vietnam, Thailand, Singapore, Philippines, Malaysia, and Indonesia.

uncertainties, despite ongoing challenges such as port closures, container shortages, labor shortages, natural disasters, geopolitical conflicts, regulatory compliance issues, and rising transportation costs in the global ITM 3PL segment. Ports and imports saw a significant increase in cargo volumes before the tariffs were in place.

This was mainly driven by retailers moving cargo ahead of the Trump administration's expected increase in duties on goods from China, Mexico, and Canada. It is estimated that global ITM increased by 7.4% to $298.6 billion in 2024 and will lead all 3PL segments, growing by 12.2% to $335.1 billion in 2025. When analyzing 3PL market segments globally, we combine Dedicated Contract Carriage (DCC) and Domestic Transportation Management (DTM) into a single ground/road transportation management segment dubbed "Transportation Management" (TM) since DCC is a more defined contractual form of trucking and is less common in some geographies. The global TM 3PL segment experienced a slight YOY increase in gross revenue of 0.3% to $583.3 billion in 2024, following a 14.6% decrease to $581.8 billion in 2023. With less restrictive monetary policy, increased demand, and a return to normalized rates in 2025, the global TM 3PL segment will grow by 2.6% to $598.3 billion.

GLOBAL 3PL REVENUES – TOTAL AND BY 3PL SEGMENT

A&A has been developing Global 3PL Market estimates since 2010 and has 3PL revenue and logistics cost estimates covering over 190 regions and countries. Asia Pacific, North America, the United States, Greater China, and Europe were the top regions by 3PL revenue in 2024.

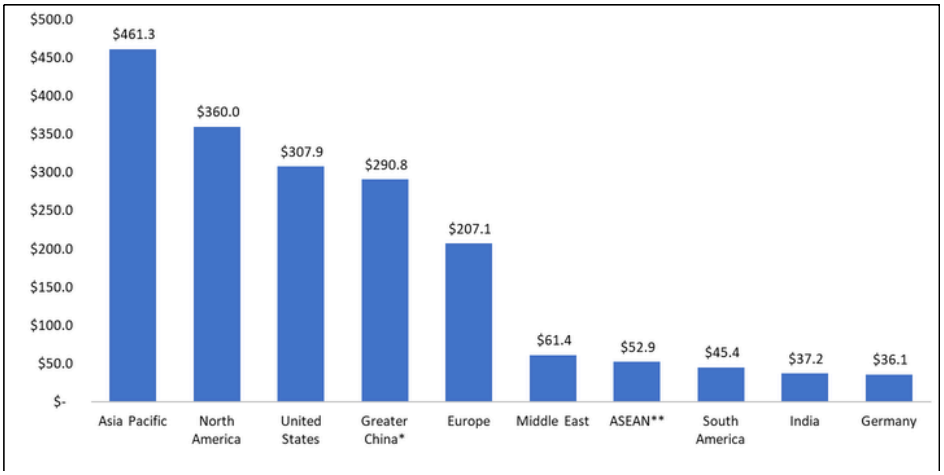
KEY REGIONS AND COUNTRIES BY 3PL REVENUE IN 2024 ($ BILLIONS)

As the region with the most 3PL revenue globally, Asia Pacific has posted a 4.9% CAGR from 2016 to 2024 and is anticipated to grow at a 7.5% CAGR over the next two years.
Major 3PLs based in the region include Nippon Express, Sinotrans, and KLN (formerly Kerry Logistics Networks). A&A's list of the 25 largest Asia-based 3PLs, based on 2024 3PL gross revenue, is as follows:

TOP 25 ASIA-BASED 3PLS

On May 12, Armstrong & Associates (A&A), in partnership with The Logistics & Supply Chain Management Society and CargoNow will host its annual 3PL Value Creation Asia Summit in Singapore.

The Summit brings together senior executives from 3PLs, investment community leaders, and technology innovators to network and share cutting-edge ideas for achieving growth in 2026 and beyond.
This unique event offers an in-depth exploration of the operational, financial, and technological aspects of the global 3PL industry. As part of this year's 3PL Value Creation Asia Summit, A&A will present its exclusive Top 50 Asia-based 3PLs list, recognizing leading logistics providers across the region. Key panel discussions at this year's summit, revealing A&A's Top 50 Asia-based 3PLs, latest marketing sizing estimates, and 3PL market trends and insights across Asia and globally, include "Third-



Greater China: China, Hong Kong SAR, Macao SAR, Taiwan SAR. ASEAN includes Brunei Darussalam, Myanmar (Burma), Lao P.D.R., Cambodia, Vietnam, Thailand, Singapore, Philippines, Malaysia, and Indonesia.

A&A Rank	Provider	Country Headquarters	2024 Gross Revenue ($ Millions)*
1	NIPPON EXPRESS	Japan	17,005
2	Sinotrans	China	14,465
3	KLN	Hong Kong SAR	7,506
4	CJ Logistics	South Korea	6,150
5	LX Pantos	South Korea	5,900
6	Kintetsu World Express	Japan	5,199
7	Yusen Logistics	Japan	5,157
8	LOGISTEED	Japan	5,081
9	JD Logistics**	China	4,420
10	CIMC Wetrans Logistics Technology	China	4,293
11	AWOT Group	China	3,470
12	SAIC Anji Logistics***	China	2,986
13	Sankyu	Japan	2,629
14	CTS International Logistics	China	2,401
15	Allcargo Logistics	India	1,699
16	Ningbo Port Southeast Logistics Group	China	1,656
17	Cargo Services Far East	China	1,490
18	Best Services International Freight	China	1,484
19	Bondex Supply Chain Management	China	1,456
20	EFL Global	Sri Lanka	1,292
21	Worldwide Logistics Group	China	1,271
22	TVS Supply Chain Solutions	India	1,172
23	Nissin Corporation/Nissin Group	Japan	1,120
24	NNR Global Logistics	Japan	1,078
25	Unitex International Forwarding (HK)	China	972

Top 25 ***Asia***-Based ***3PLs***

Party Logistics (3PL) Key panel discussions at this year's summit, revealing A&A's Top 50 Asia-based 3PLs, latest marketing sizing estimates, and 3PL market trends and insights across Asia and globally, include "Third-Party Logistics (3PL) Market Trends and Analysis," "Global and Regional 3PL Market Trends," and "Tariff Impacts and Global Trade Dynamics."



Evan Armstrong

Chief Executive Officer at Armstrong & Associates, Inc. (A&A)

Evan has over 30 years of experience in supply chain management. As CEO of Armstrong & Associates, Inc., he oversees our market research initiatives and provides supply chain consulting services in the following areas: business planning, logistics outsourcing, mergers and acquisitions, market analysis and benchmarking, transportationmanagement, expert witness, and supply chain systems selection.

Before joining Armstrong & Associates, Inc. in February 2000, Evan was Vice President of Pricing at Roadrunner Freight Systems, Inc. and has held sales, marketing, and operations positions with major transportation and logistics providers.

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An Era of Fast Evolution and Innovation Utilizing Modern Resources as a Strategic Advantage

Feature Article By Jason Kristoffer Arino (Kris), TAPA APAC Intelligence System (TIS) Expert

Supply chains across Asia Pacific are operating in an era where disruption is no longer episodic, but structural. Cargo crime, counterfeiting, cyber intrusion, geopolitical volatility, and climate-driven events now intersect with unprecedented frequency and impact. In 2025 alone, intelligence data recorded more than 488 cargo theft incidents and 516 counterfeit cases across APAC, with direct cargo losses exceeding USD 30 million and indirect counterfeit losses estimated at USD 2.4 billion.

These figures are not abstract statistics; they represent halted production lines, compromised customer trust, regulatory exposure, and long-term erosion of competitive advantage. What is equally concerning is not just the scale of loss but the evolution of criminal behaviour. Supply chain crime is becoming more targeted, more organized, and more technologically enabled.

Criminal groups increasingly exploit predictability in logistics operations, weak points in digital integration, and fragmented visibility across multi-tier supplier networks. Against this backdrop, traditional supply chain strategies focused primarily on cost efficiency and speed are proving insufficient. The imperative has shifted decisively toward resilience, scenario planning, and proactive risk management, supported by intelligence-led decision-making and industry collaboration. At its core, modern supply chain risk management is no longer about reacting faster after disruption occurs.

It is anticipating risk before it materializes, understanding where vulnerabilities lie, and designing response mechanisms that allow operations to continue even under adverse conditions. This forward-looking approach is increasingly essential as disruptions arise from a wider range of sources and propagate more quickly across interconnected supply networks.

DATA INTELLIGENCE AND INSIGHTS FROM 2025 CARGO CRIME TRENDS

Recent data intelligence from 2025 annual reports shows persistent and evolving risks across the region. While the total number of reported incidents in 2025 remained broadly consistent with previous years, the financial impact fluctuated sharply between quarters, indicating a trend toward fewer but higher-value losses.

This also shows selective targeting by criminal groups, often informed by insider knowledge, surveillance, or exploitation of operational routines. Cargo crime is rarely opportunistic. Patterns observed across incidents



suggest coordinated activity by experienced groups that share methods, adapt quickly, and repeatedly exploit successful approaches. These include the use of fraudulent documentation, impersonation, infiltration of legitimate operations, and, in some cases, intimidation or violence. Such dynamics reminds and highlights the importance of risk assessments that go beyond isolated incidents and Instead, focus on systemic exposure and repeatable vulnerabilities.

NEARLY HALF OF CARGO CRIME OCCURS AT FACILITIES AND VEHICLES IN-TRANSIT

Analysis of incident locations revealed a clear concentration of risk. Facilities accounted for 22.7% of reported incidents, while vehicles in transit accounted for 26.2%, meaning nearly half of all cargo crime occurred in these two environments. These locations represent predictable points in the logistics chain where goods are stationary, staged, or temporarily unattended.

Warehouses, distribution centres, and manufacturing facilities typically operate on fixed schedules with known access points. When access controls, perimeter security, or monitoring systems are inconsistent or outdated, they provide attackers with opportunities to observe routines, test defences, and time intrusions. Similarly, vehicles parked at unsecured locations, rest areas, or staging zones remain highly vulnerable, particularly when drivers are absent or distracted. This risk profile is consistently reinforced by both academic research and industry data, which identify unattended vehicles as one of the most frequent loss scenarios. The dominant modus operandi across incidents remains intrusion, accounting for 39.3% of reported cases. This includes breaching physical perimeters, bypassing access controls, and exploiting weaknesses in surveillance or alarm systems.

The persistence of intrusion as a leading tactic highlights a critical reality for supply chain operators: security measures cannot remain static. Controls that were effective even a few years ago may already be well understood and circumvented by organized criminal groups.

PRODUCT TARGETING REFLECTS ECONOMIC MOTIVATION

The distribution of stolen goods further illustrates the commercial logic behind cargo crime. Food and drink (12.7%) continue to be a frequent target due to high potential. However, categories such as tools and building materials (10.7%), miscellaneous goods (10.2%), and auto parts (9.8%) also feature prominently. Auto parts are closely associated with organized criminal activity. Components such as catalytic converters, electronic modules, wiring harnesses, and specialized parts command strong prices in secondary markets and are difficult to trace once removed from legitimate supply chains. This further supports why it is important for sector-specific risk assessments that consider not only volume, but value density, resale liquidity, and traceability.

CYBER RISK ESCALATION AND THE RESPONSIBLE USE OF AI

Alongside physical threats, cyber risk is rising sharply as supply chains accelerate digital transformation. Greater reliance on interconnected logistics platforms, procurement systems, vendor portals, and cloud-based services has expanded the attack surface available to threat actors.

Recent TIS reporting highlights multiple cyber incidents targeting supply chain operations across APAC, ranging from data theft and industrial espionage to ransomware andvextortion schemes involving the release of .



customer and employee data These attacks rarely stop at a single organization. A breach at one supplier, software provider, or service partner can rapidly cascade across an entire network, disrupting operations far beyond the initial point of compromise. As artificial intelligence and automation become more embedded in supply chain processes, risk management strategies must evolve in parallel, integrating cyber and physical security planning rather than treating them as separate domains.

THE HIDDEN AND EXPANDING IMPACT OF COUNTERFEIT GOODS

Counterfeiting represents one of the most damaging and often underestimated supply chain risks. In 2025, 15 APAC countries reported counterfeit incidents, with India, Vietnam, and the Philippines among the most active reporters. While this reflects significant illicit activity, it also points to increased enforcement and detection capabilities in these markets.

Large-scale seizures across Vietnam, South Korea, and the Philippines are examples of the operational maturity of counterfeit groups, which increasingly leverage both physical distribution channels and digital marketplaces.

The range of affected products, from luxury goods and apparel to cosmetics, pharmaceuticals, electronics, and everyday consumer items, shows how counterfeiters diversify based on demand, margins, and ease of infiltration. Beyond direct revenue loss, counterfeit goods generate substantial indirect and long-term consequences:

- Brand and reputation damage, particularly when substandard products reach consumers
- Market distortion and lost sales for legitimate manufacturers
- Tax revenue losses for governments
- Public health and safety risks, especially in regulated sectors such as pharmaceuticals, cosmetics, and food.

These impacts show why the need for end-to-end visibility, authentication controls, and closer collaboration between brand owners, logistics providers, and enforcement agencies are heavily encouraged.

COLLABORATION AND INTELLIGENCE SHARING AS THE NEW OPERATING MODEL

Resilience is not built in isolation. Organizations that actively share incident data, risk insights, and best practices across their supply chain develop a more accurate and timely understanding of emerging threats. Open communication with suppliers, logistics partners, and customers enables faster responses, more coordinated mitigation, and quicker recovery when disruption occurs. Increasingly, leading organizations view resilience not





as a cost centre, but as a strategic capability. By embedding risk assessment and scenario planning into everyday operations, companies are better positioned to protect service continuity, safeguard reputation, and support sustainable growth even in an environment defined by uncertainty.

THE WAY FORWARD

Supply chain resilience must now be treated as a core business capability. Intelligence-led risk assessment and scenario planning are essential to anticipating disruption and sustaining performance in a volatile environment.

By using data as a strategic advantage, strengthening collaboration across partners, and continuously adapting security and risk frameworks, organizations can reduce exposure, improve visibility, and respond with confidence. The supply chains that succeed will be those that evolve alongside emerging threats rather than reacting after disruption occurs.

"As shown in the findings of TIS for 2025, cargo crime has increased by 40% from 2023, criminal groups are becoming more targeted, more organized, and more technologically enabled. That means our approach to securing supply chains must evolve just as quickly, grounded in insight, scenario planning, and continuous improvement." - *Tony Lugg, Chairperson, TAPA APAC*





Jason Kristoffer Arino (Kris)

TAPA APAC Intelligence System (TIS) Expert

Jason Kristoffer Arino is the TAPA APAC Intelligence System (TIS) Expert, bringing strong expertise in data analysis, research, and supply chain security intelligence.

He leads the management and development of the TIS platform, ensuring it is continuously updated with the latest cargo crime data and TAPA certification insights across the Asia Pacific region.

Through rigorous statistical analysis, Kristoffer provides actionable intelligence that supports members in risk assessment and route planning decisions. He also coordinates a network of voluntary industry experts who contribute insights to the platform, and regularly organises webinars on emerging cargo crime trends to strengthen industry awareness and resilience.

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