



REDESIGNING
SUPPLY CHAINS IN
THE NEW ERA OF
MANUFACTURING

25-26 NOVEMBER 2022

Porsche Experience Center Franclacorta

Value Chain Resilience

in the New Era of Global Economy

Porsche Consulting

Strategic Vision. Smart Implementation.



A new Order in global Value Chains

Geopolitics

Technology-related foreign direct investments between USA and China declined by 96% in the last 5 years



Sustainability

over €145 billion economic losses in the EU over the past decade



Growth Potential

With \$3.2 trillion GDP ASEAN is the fifth-largest economy, well on track to become the fourth largest by 2030



Technology Change

Near 100% of custom hearing aids are 3D printed today. The total number of 3D printed hearing aids in use is over 10 million in 2021



Legislations

'Fit for 55' deal will end the sale of new CO₂ emitting cars in Europe by 2035

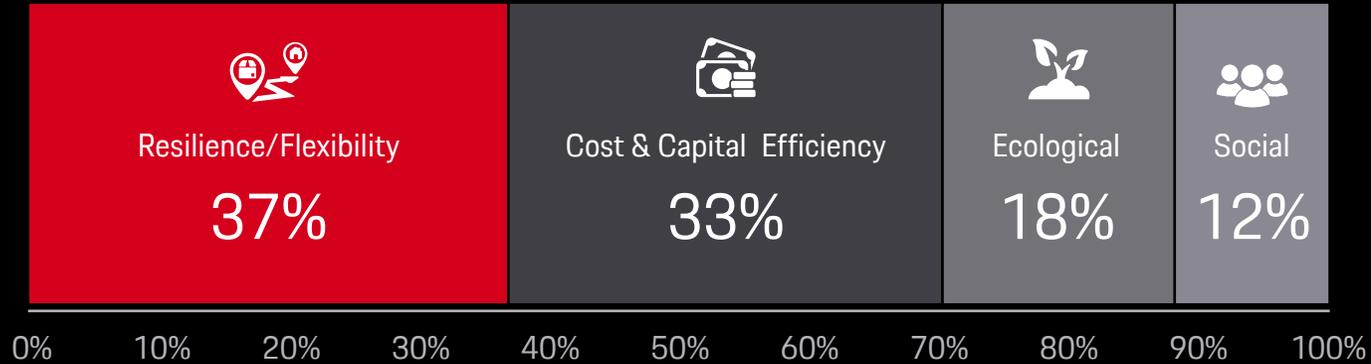


Competencies

Today in Germany 137.000 IT-experts are missing, 7 months in average are required to fill a vacancy



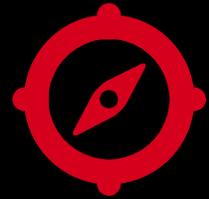
SHORT-TERM
Value Chain
Strategy
Drivers



LONG-TERM
Value Chain
Strategy
Drivers



Time horizon influences strongly footprints decisions of global executives



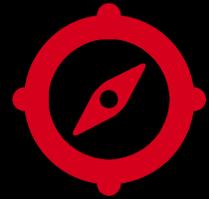
What if?



How many?



How fast?



What if?



How many?



How fast?



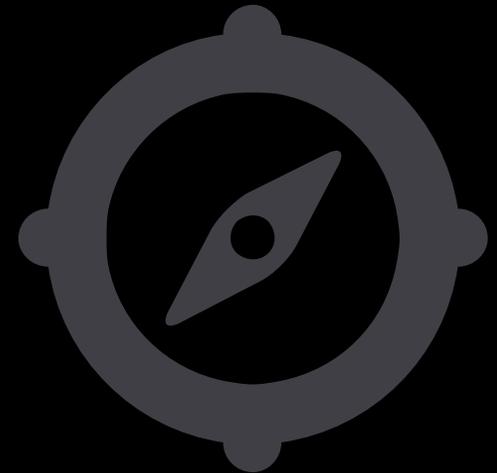
What if?

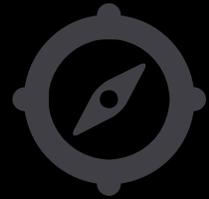


Imagine extreme
and even improbable

scenarios

to discover new ways of
future competitiveness





What if?



How many?



How fast?



How many?

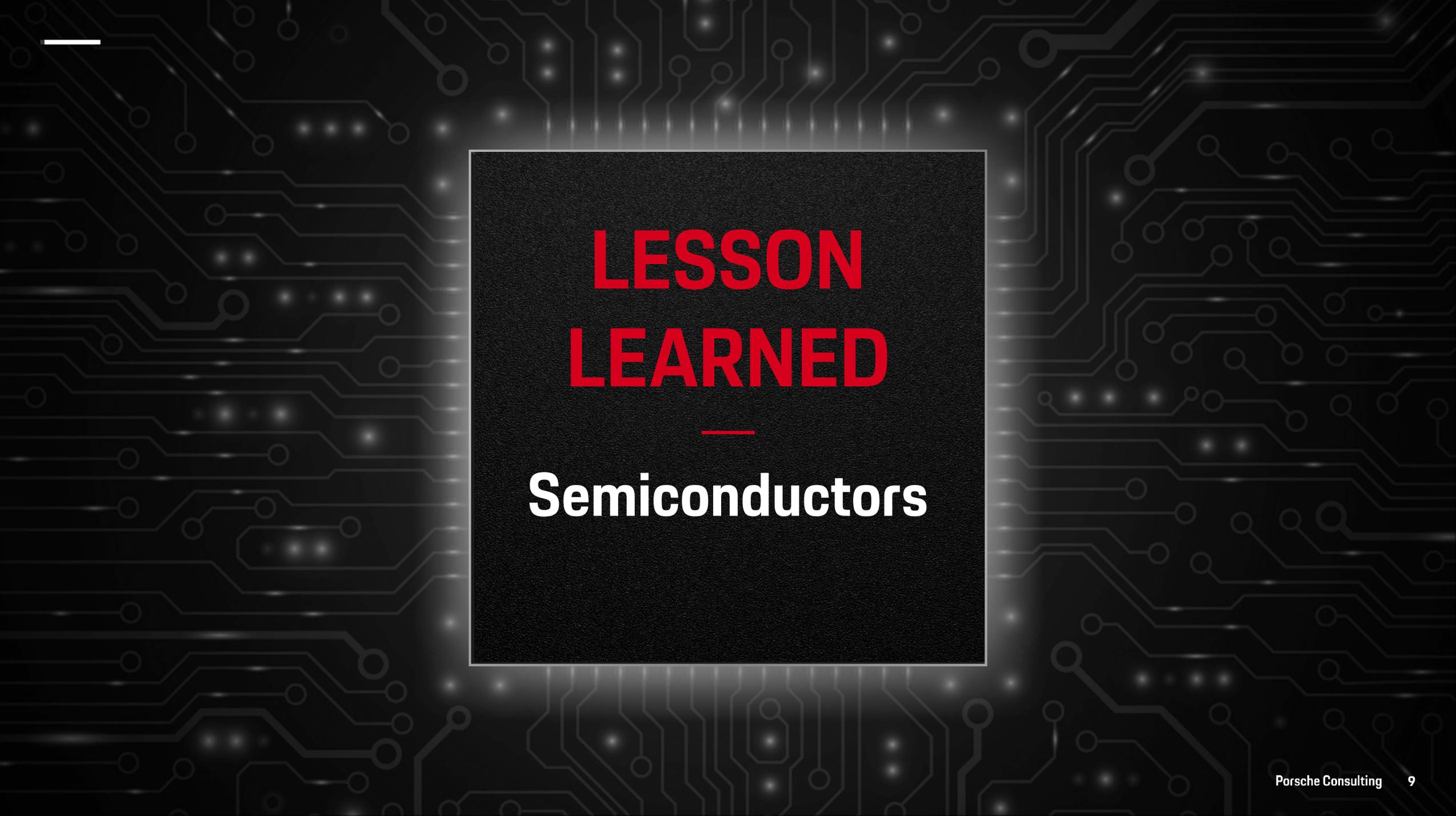


Single source and first-tier
management is over

redundant

and complex value chains
directly controlled is the way



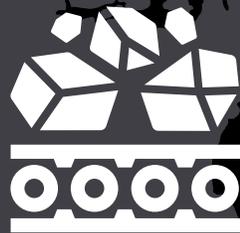


**LESSON
LEARNED**

Semiconductors

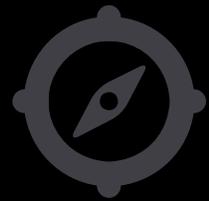
GERMANY

CANADA



**FUTURE
REPUTATION
is key**





What if?



How many?



How fast?



How fast?



In strategic choices opt as much as possible for

fluidity

and create an early warning system to move fast



Common understanding

Reshoring is the solution & Europe will benefit for its manufacturing vocation



Our experience

Redesign a global footprint with new paradigms:
Flexibility, agility, costs, sustainability





Common understanding

It's time for
fully automated
gigafactories
to compensate
relocation costs



Our experience

**Manufacturing
investments are
heavy & sticky:**
**Test and learn before
making a big bet**





Common understanding

Raw materials & components are at risk, agreements and long-term contracts are urgent



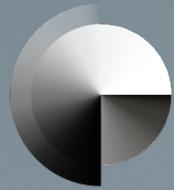
Our experience

Don't forget sustainability & reputation risks while choosing your partners





—
Let's leverage
global reshuffling
for a better
HUMANITY
FUTURE!



WORLD MANUFACTURING FORUM

WMF