

# Supply Chain Strategies Under Challenging Environments

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Shaping the Future  
of Global Supply Chains



## Industrial Strategy & Resilience Agenda

- **Goal:** Reduce critical dependencies, strengthen strategic autonomy.
- **Focus Areas:** Semiconductors (EU Chips Act), Mobility, Critical Raw Materials, Pharma.
- **Approach:**
  - Derisking, not Decoupling
  - Diversification of suppliers
  - Build EU production capacity & circular economy
  - Set global standards for sustainability & interoperability



## Supply Chain Resilience Strategy

- **Goal:** Secure critical goods, boost domestic manufacturing.
- **Focus Areas:** Clean Energy, Semiconductors, Mobility, Pharma, Rare Earths.
- **Approach:**
  - Reshoring & Friendshoring
  - Strategic stockpiles
  - Heavy investment in R&D and infrastructure



FACT SHEETS

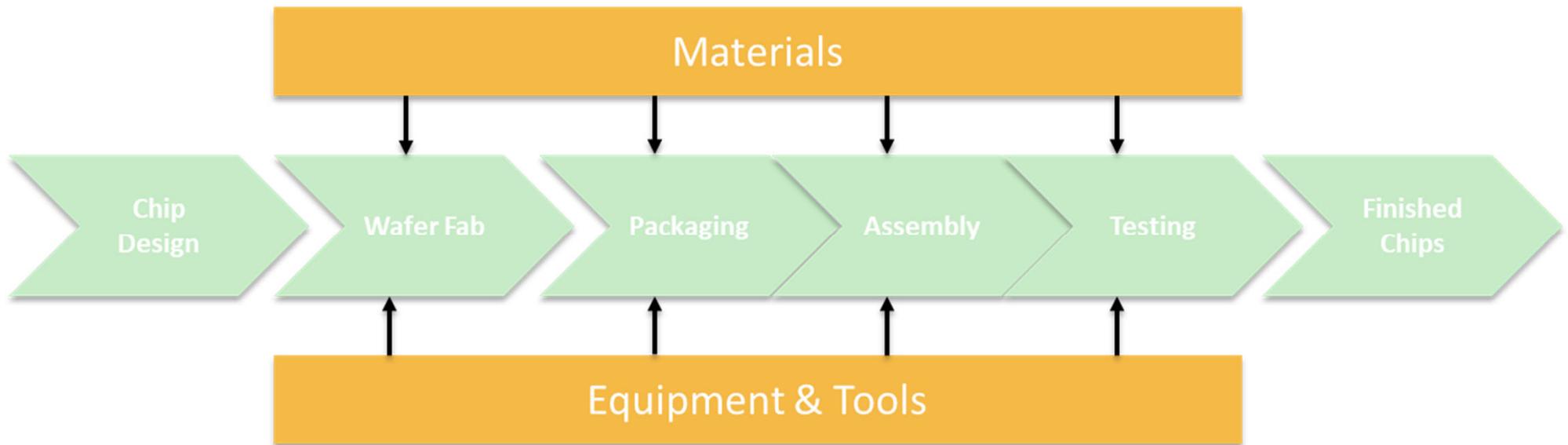
# Fact Sheet: President Donald J. Trump Takes Action on Certain Advanced Computing Chips to Protect America's Economic and National Security

The White House

January 14, 2026

**SUPPORTING AMERICA'S SEMICONDUCTOR INDUSTRY:** Today, President Donald J. Trump

## The Global Semiconductor Supply Chain

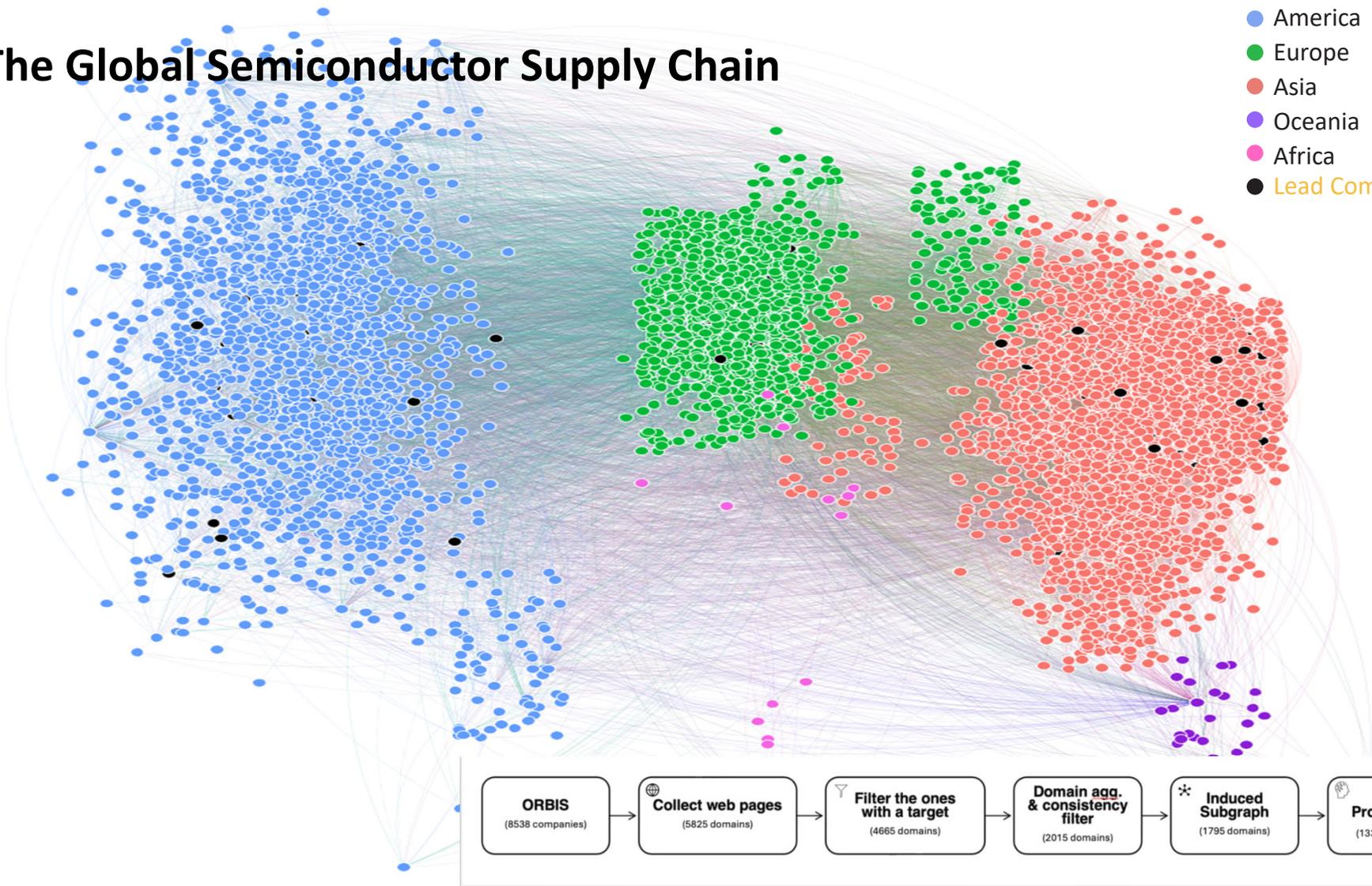


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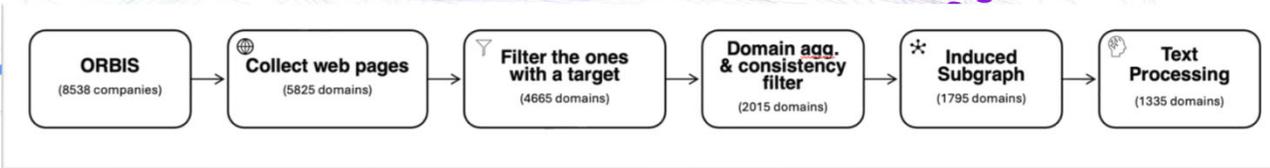
A **stylized value chain** simplifies complex supply chains through **abstracted, standardized process steps**, making it easier to identify and **analyse patterns, dependencies and optimization potential**.

# The Global Semiconductor Supply Chain

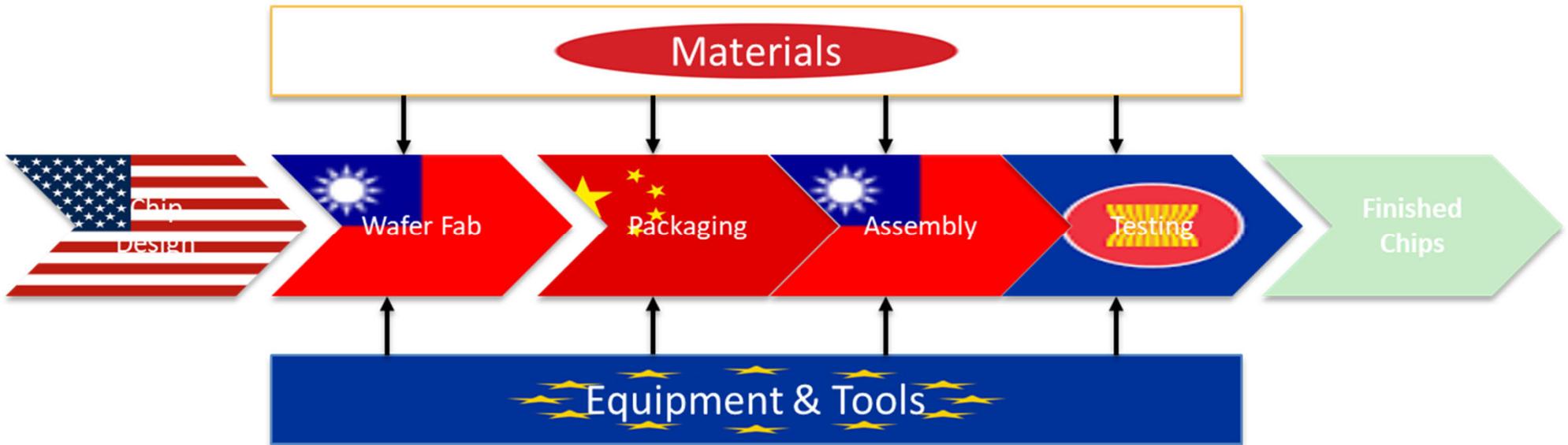
- America
- Europe
- Asia
- Oceania
- Africa
- Lead Companies



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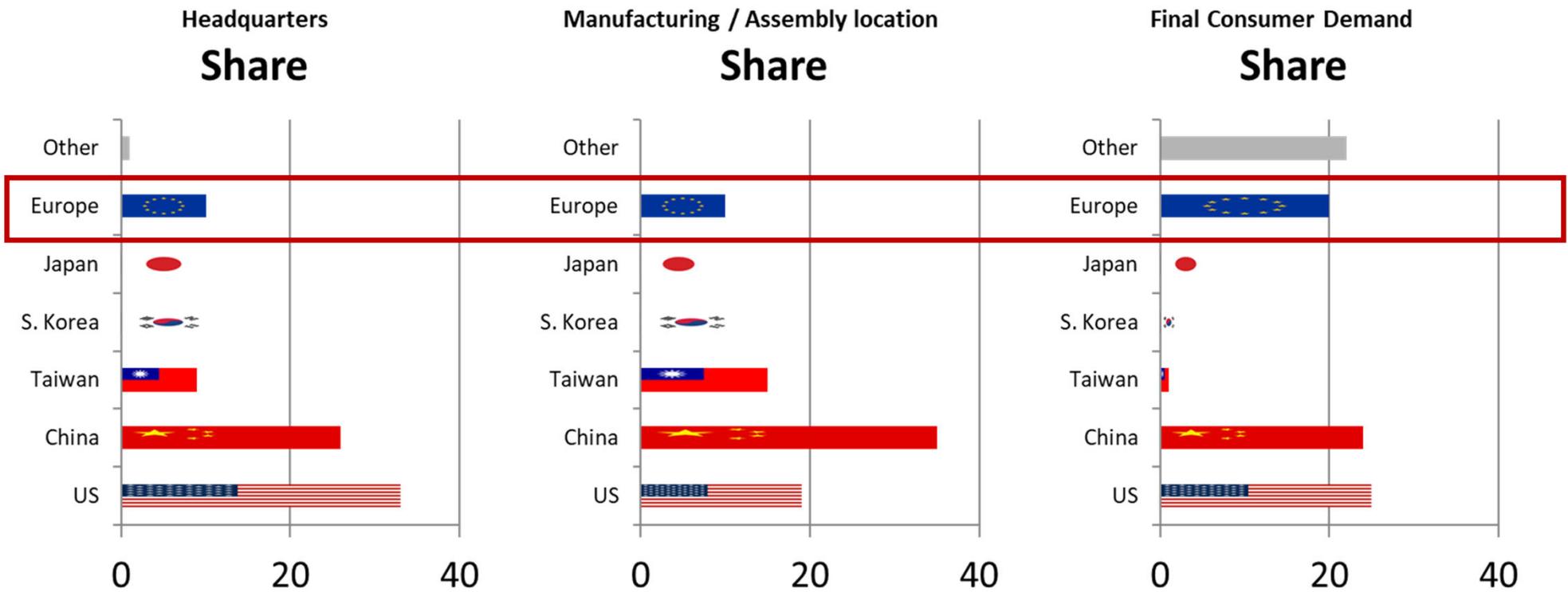


# The Dominant Actors in the Global Semiconductor Supply Chain



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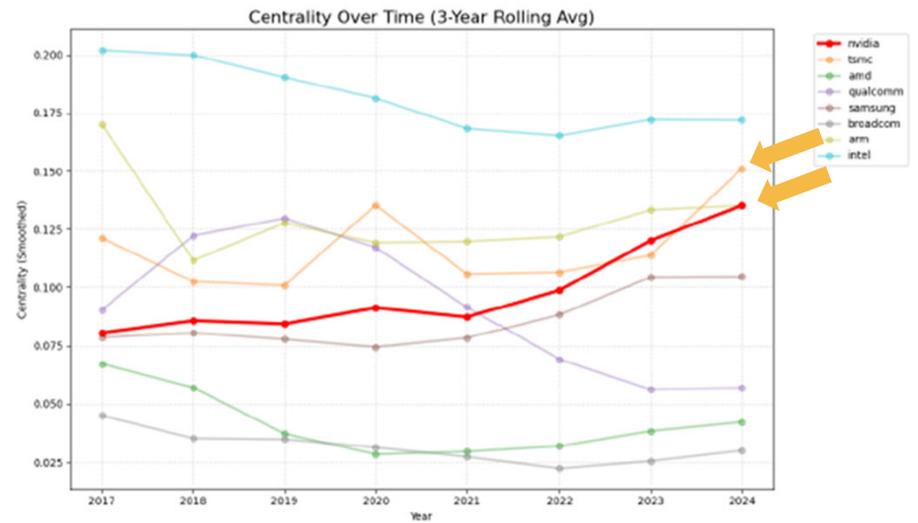
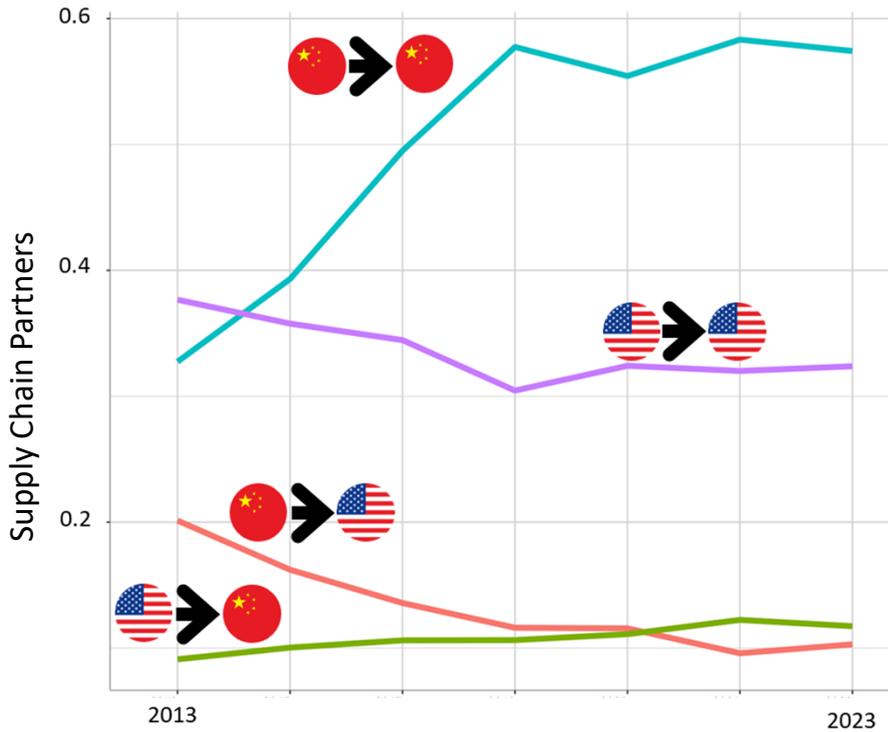


Source: BCG analysis with data from SIA, WSTS, Gartner, IDC

# The Global Semiconductor Supply Chain – An Interim Conclusion

China started to decouple more than a decade ago.

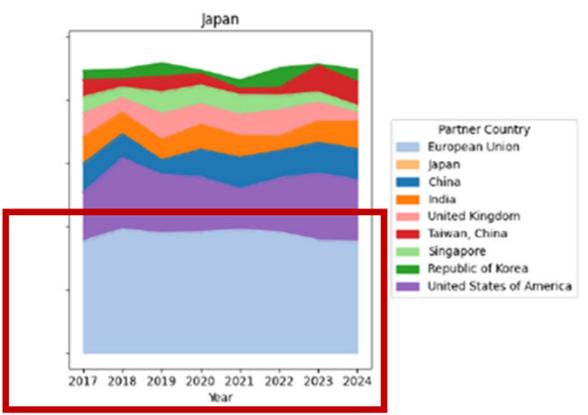
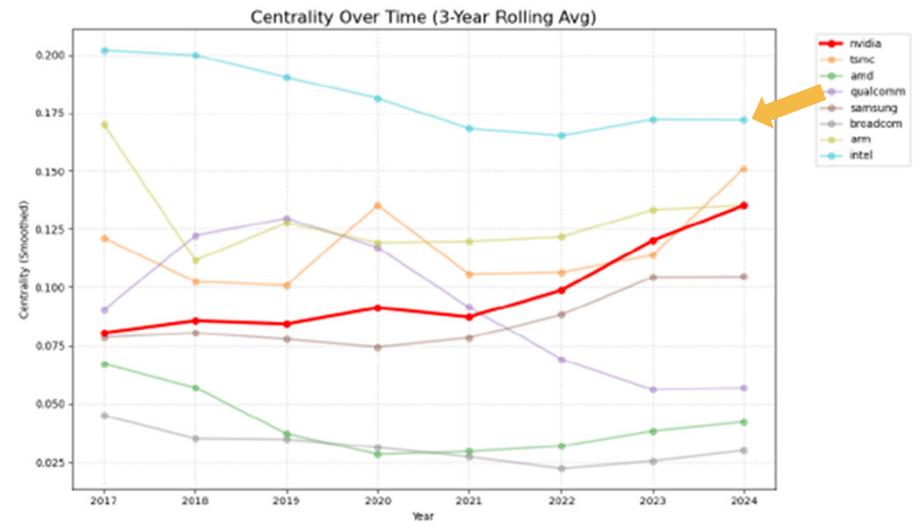
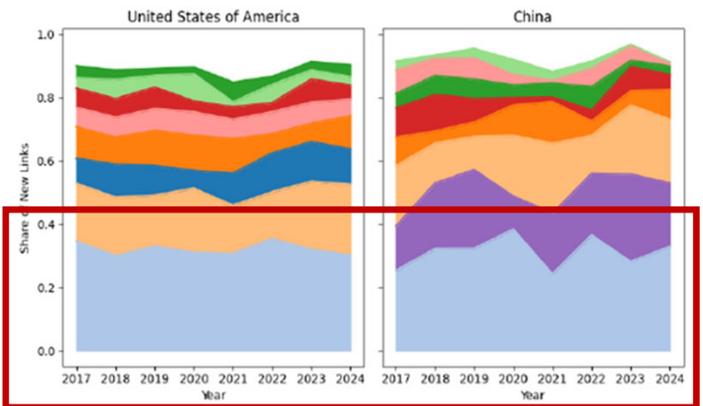
AI is reshaping the balance of power.



# The Global Semiconductor Supply Chain – An Interim Conclusion

Totgesagte leben länger.

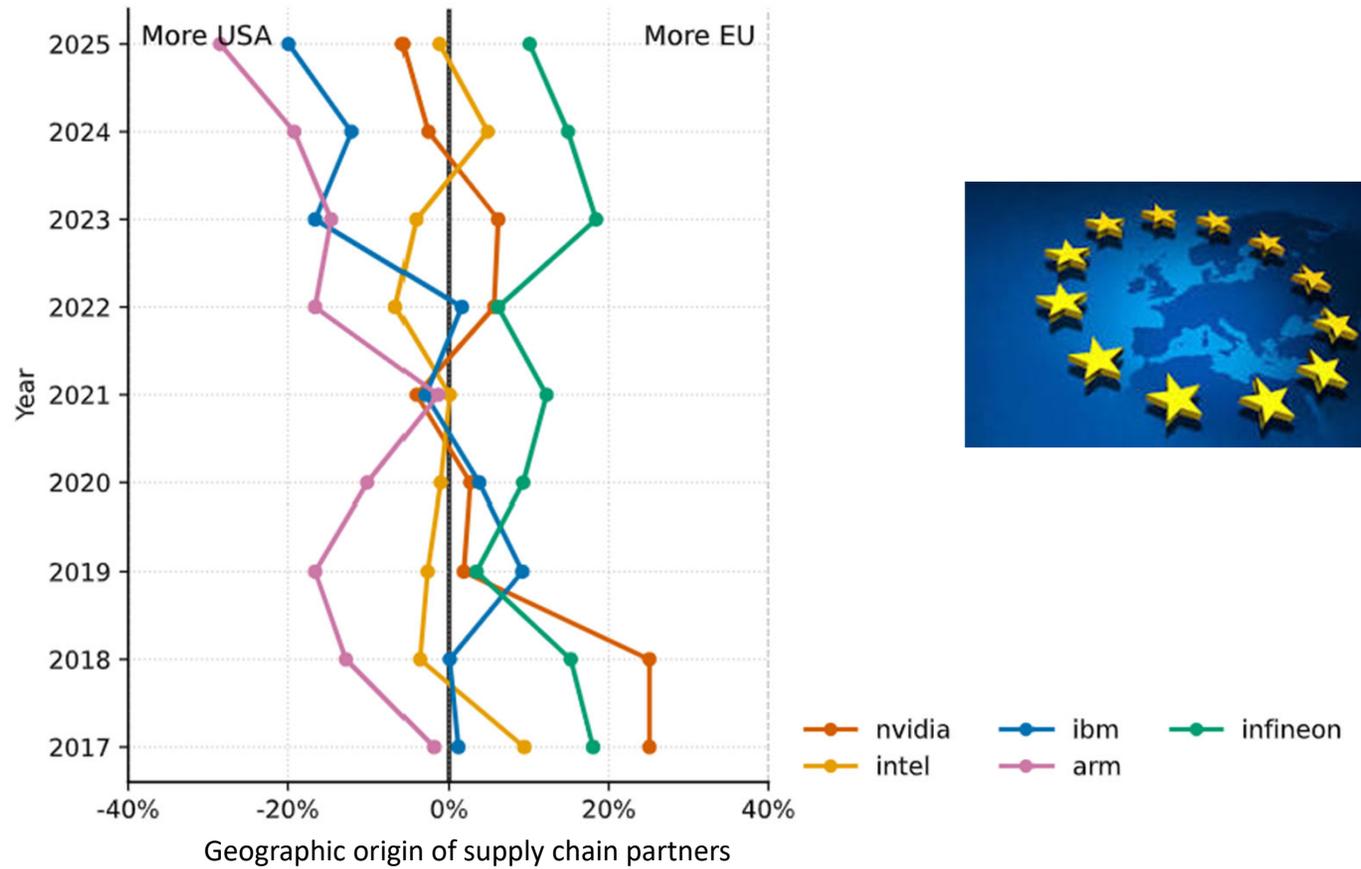
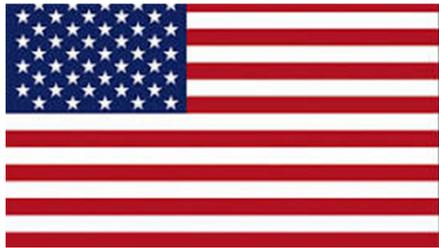
Written off, but still going strong.



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# The Global Semiconductor Supply Chain – An Interim Conclusion

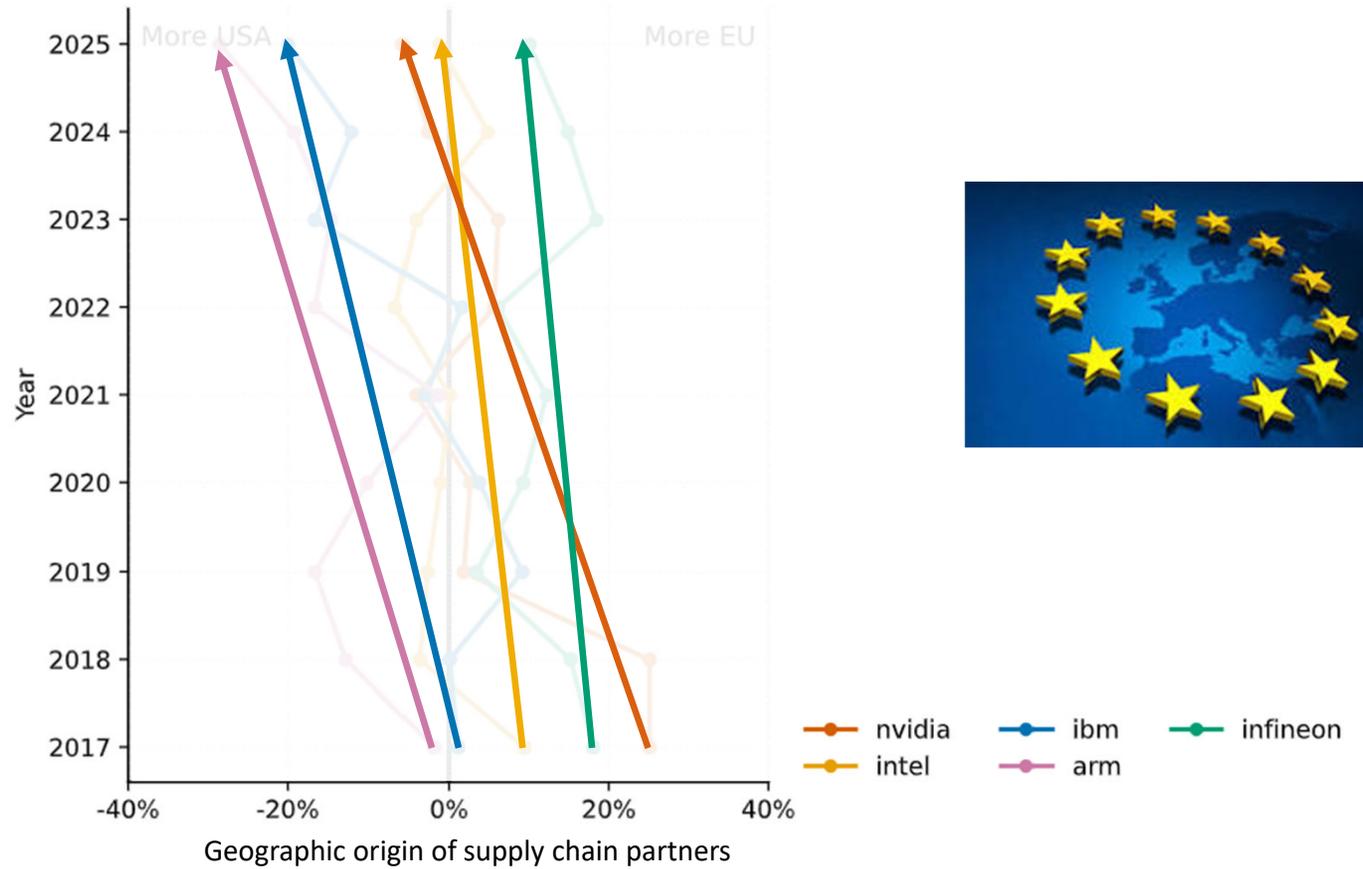
The global semiconductor supply chain is becoming more American.



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# The Global Semiconductor Supply Chain – An Interim Conclusion

The global semiconductor supply chain is becoming more American.



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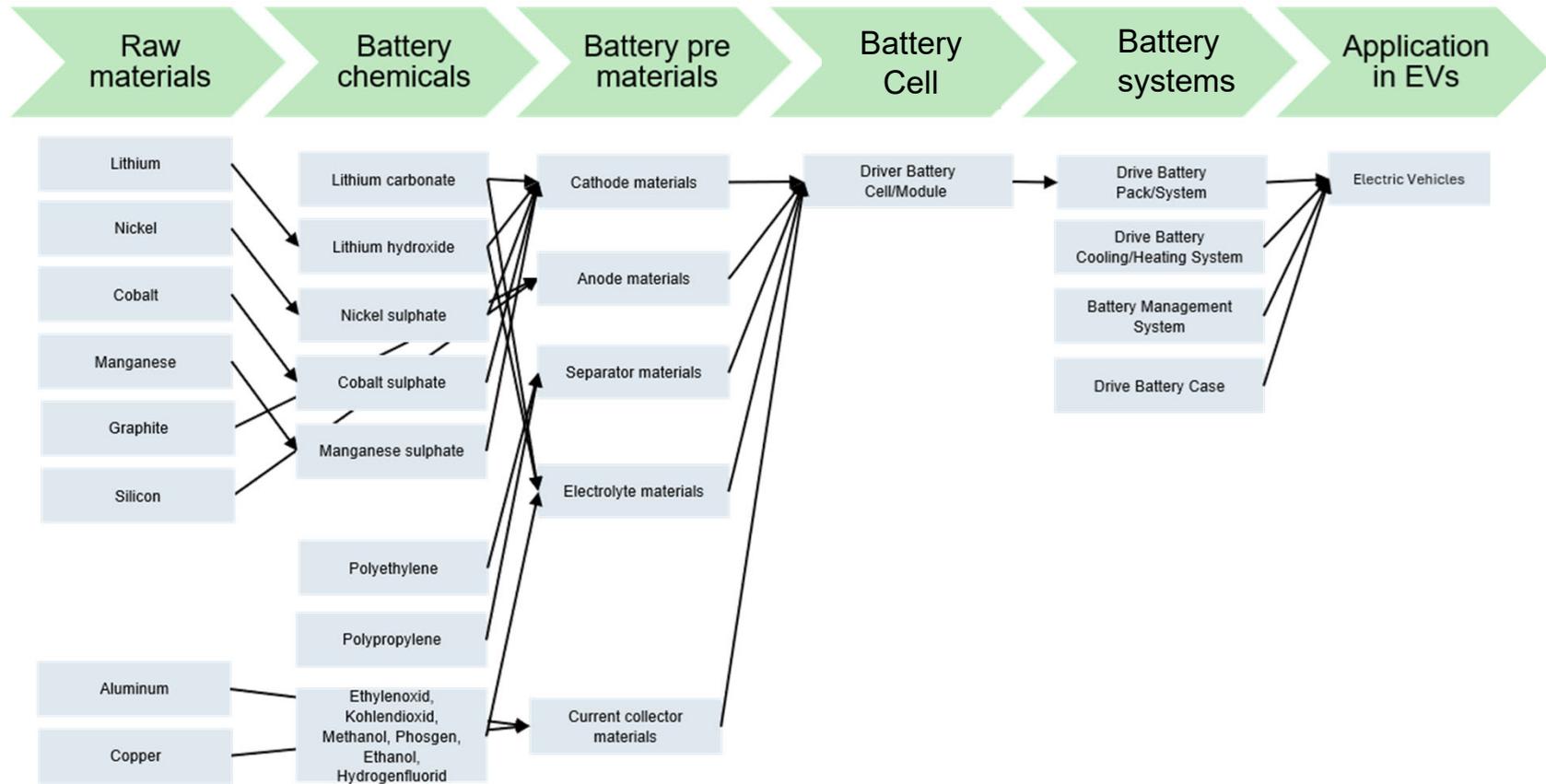
# Fact Sheet: President Donald J. Trump Incentivizes Domestic Automobile Production

The White House

April 29, 2025

**INCENTIVIZING DOMESTIC AUTO PRODUCTION:** Today, President Donald J. Trump signed a proclamation to protect national security by incentivizing domestic automobile production and

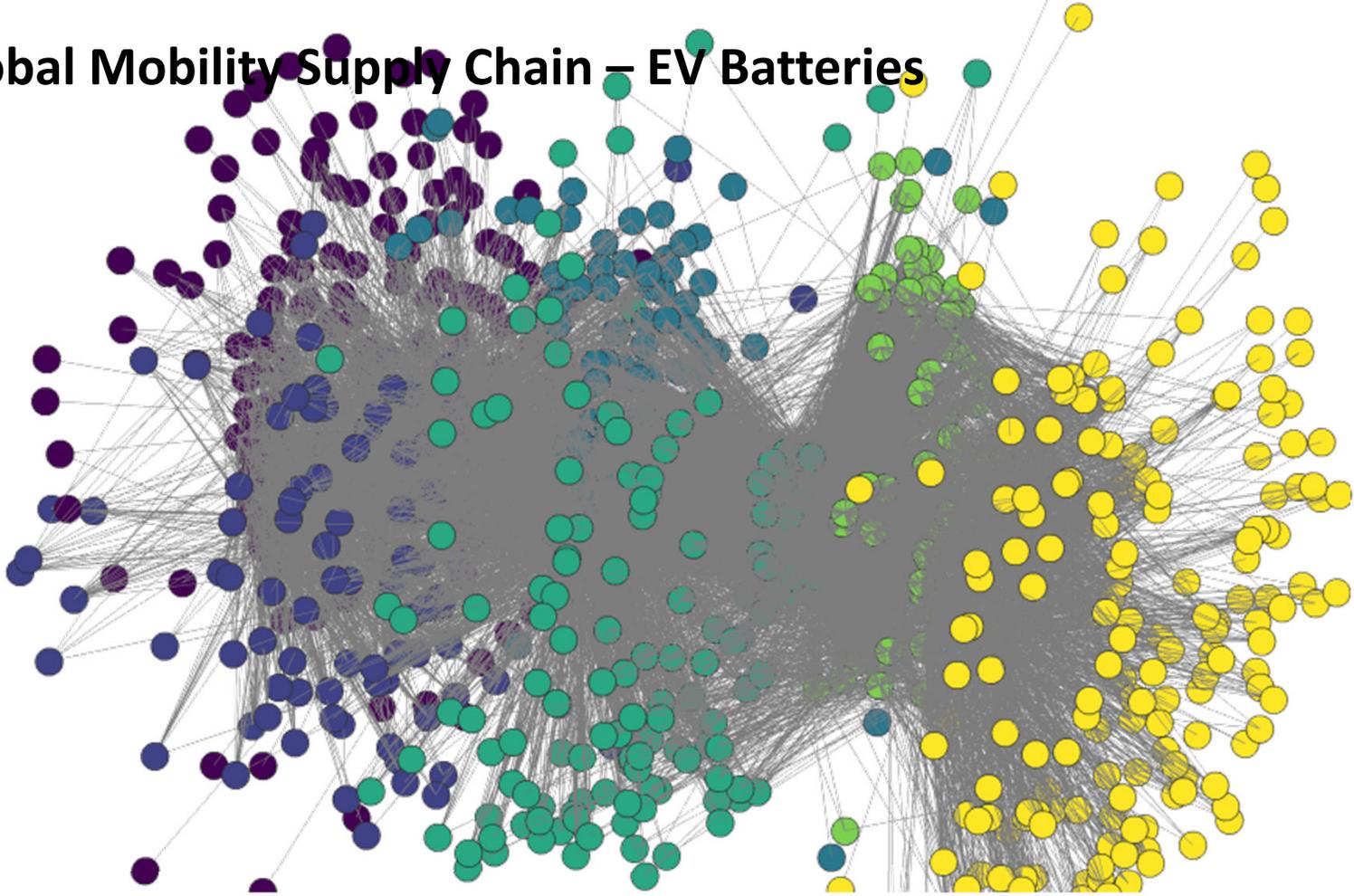
# The Global Mobility Supply Chain – EV Batteries



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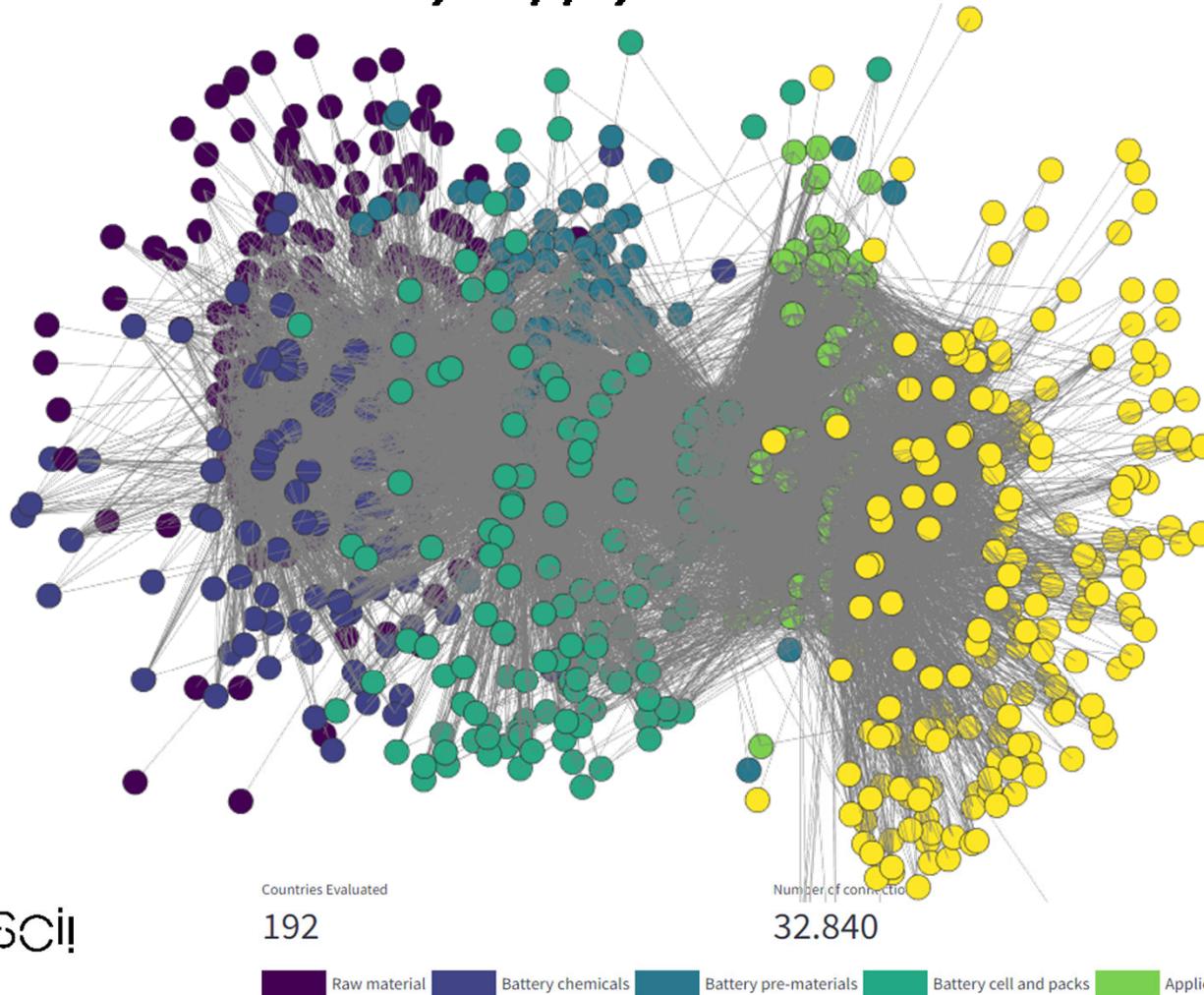


Countries Evaluated  
192

Number of connections  
32.840

Raw material    Battery chemicals    Battery pre-materials    Battery cell and packs    Application in EV    EV Consumer

# The Global Mobility Supply Chain – EV Batteries



- Is highly complex and highly concentrated.
- Over **190 countries** are engaged in more than **32,000 trade relationships**.
- **Eight lithium mining companies** in the US, Chile, China, and Australia control over **95% of the global market share**.
- **10 producers** of battery cells and packs in China, South Korea, and Japan account for **over 93% of the global market**.

# The Global Mobility Supply Chain – EV Batteries

## Regional supply chain strengths

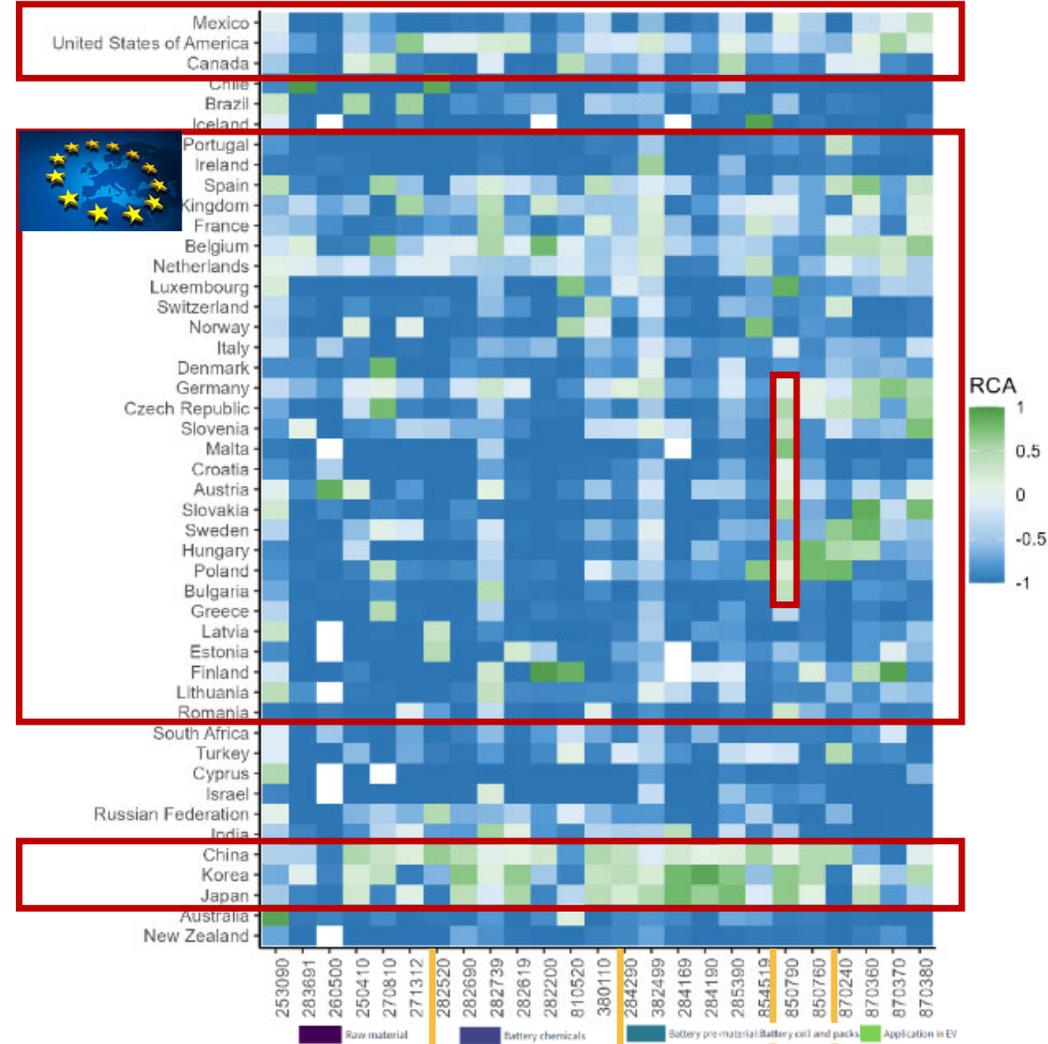
### Method

- RCA (Revealed Comparative Advantage) shows the efficiency in a country comparison, based on trade data.
- The greener, the more efficient (= competitive advantage).

### Global competitiveness

- For a 70kWh battery, **production costs** are more than **30% lower in China** and over 20% lower in the US compared to Europe.
- **Subsidies account for the majority of this cost competitiveness**, with energy cost differences contributing an additional \$4 to \$5 per kWh.
- **(Chinese) Overcapacity** is likely to hinder EU efforts to develop competitive and independent battery supply chains in the short term.

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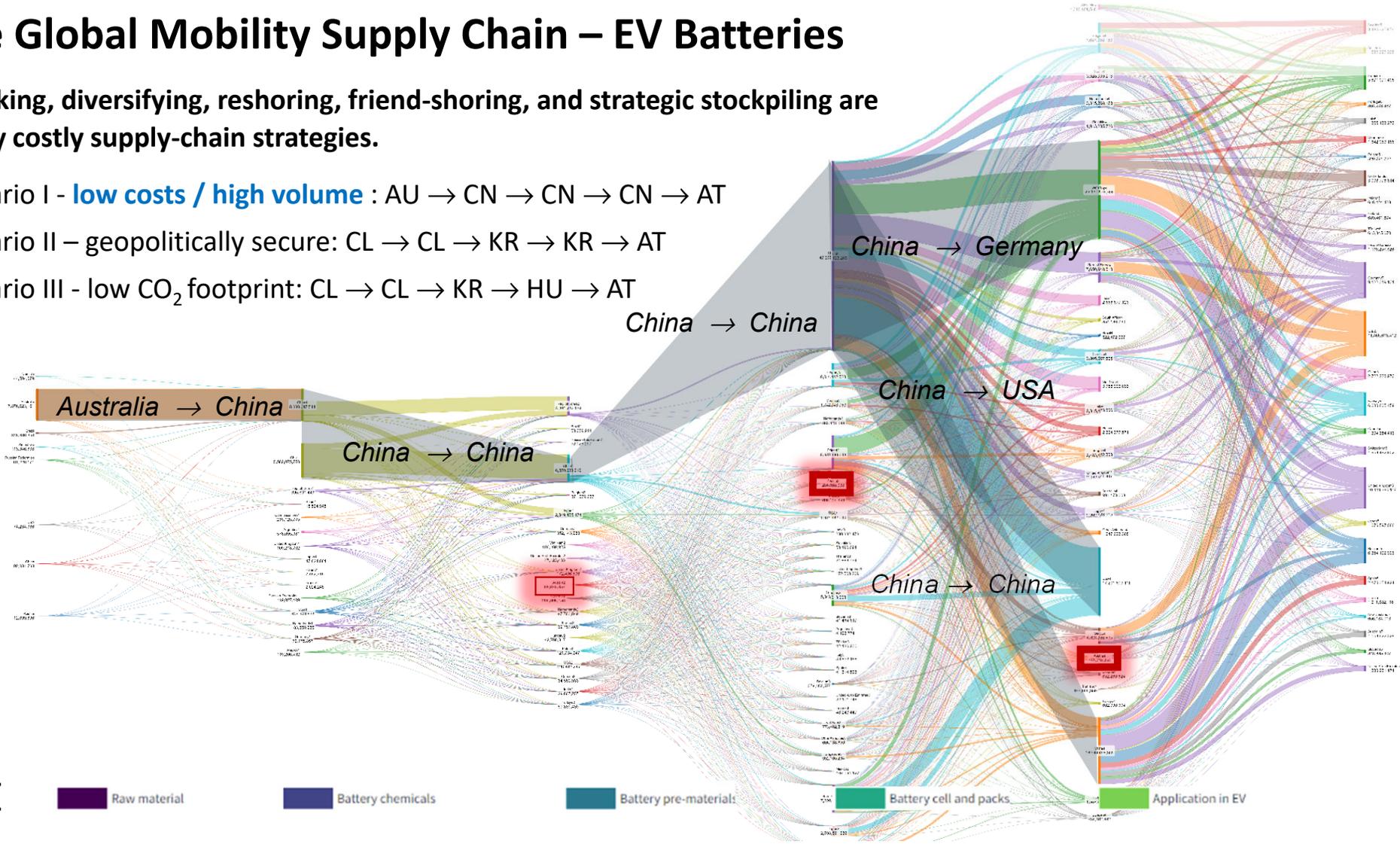
# The Global Mobility Supply Chain – EV Batteries

Derisking, diversifying, reshoring, friend-shoring, and strategic stockpiling are highly costly supply-chain strategies.

Scenario I - low costs / high volume : AU → CN → CN → CN → AT

Scenario II – geopolitically secure: CL → CL → KR → KR → AT

Scenario III - low CO<sub>2</sub> footprint: CL → CL → KR → HU → AT



# The Global Mobility Supply Chain



Sourcemap

<https://www.sourcemap.com> › blog · [Diese Seite übersetzen](#) ⋮

## Tesla's China-Free Supply Chain Mandate

18.11.2025 — Tesla is requiring its suppliers to exclude all China-made components from vehicles produced in the United States within the next 12-24 months.



Braumiller Law Group

<https://www.braumillerlaw.com> › ... · [Diese Seite übersetzen](#) ⋮

## China's Grip on Supply Chains and General Motors 2027 ...

General Motors (GM) has instructed thousands of its suppliers to phase out sourcing **parts** and materials from **China** by 2027.

# SC Strategies Under Challenging Environments

## - an interim conclusion

- **Self-confidence!** US is the world's largest economy ~26 % of Global GDP in 2024, but EU-27 is #2 ~18 % of Global GDP.
- **You can't be everybody's darling.** Europe first.
- **There is no free lunch.** Derisking, diversifying, reshoring, friend-shoring, and strategic stockpiling are highly costly supply-chain strategies.
- **Sustainability is not sustainable** without the 3<sup>rd</sup> P of the triple bottom line (i.e. profit).
- **Austrian Whiskey is getting better and better ;-)**

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# Shaping the Future of Global Supply Chains

... starts with research  
& with you.

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