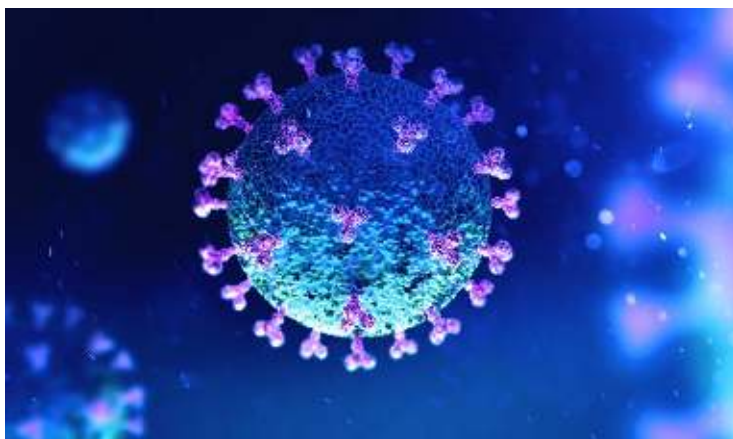


## **Symposium : les ouvrages de protections contre les risques naturels : évolutions et perspectives**

8 Juillet 2022

### **Chaîne d'approvisionnement globale affectée par le COVID & la guerre**

Philipp Sidler, Geobrugg

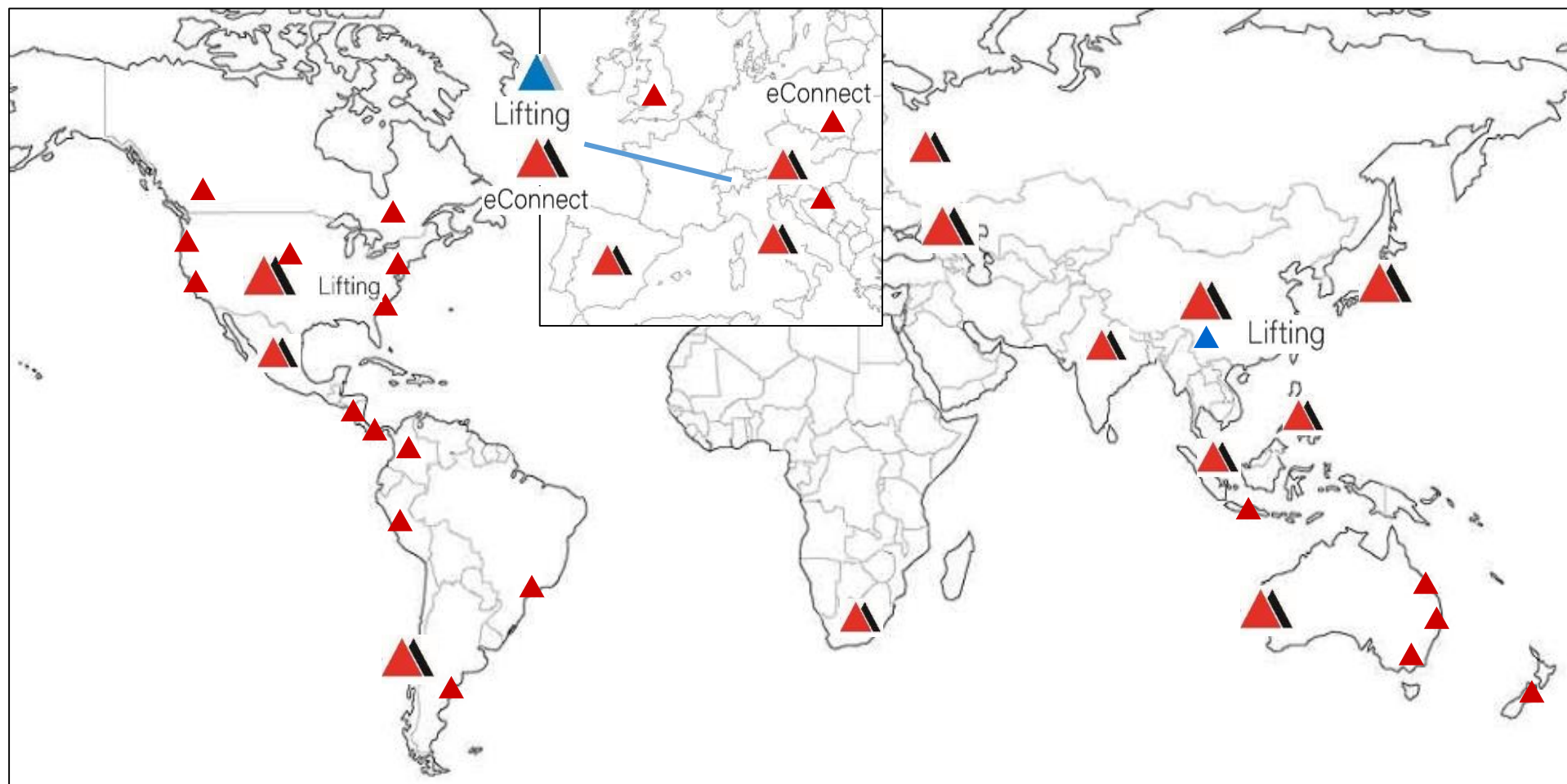




## Chaîne d'approvisionnement globale affectée par le COVID & la Guerre



## L'organisation globale de la Division Ropes du Groupe BRUGG



### GEOBRUGG

-  Plant
-  Subsidiary
-  Sales office

### FATZER

-  Plant
-  Sales office

### BRUGG Lifting

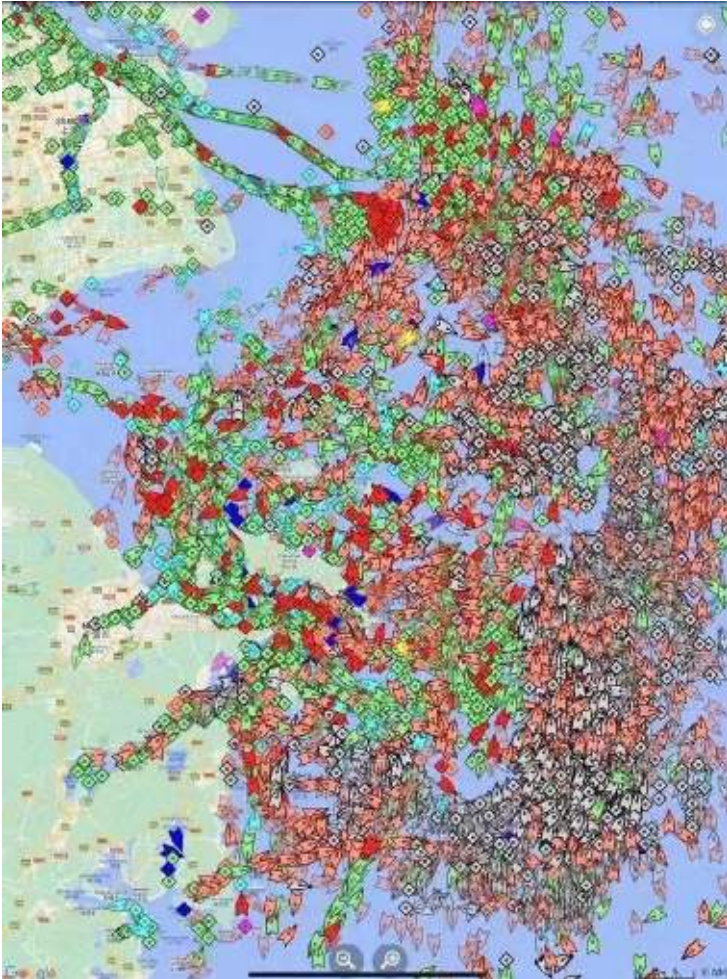
-  Plant
-  Subsidiary

### BRUGG eConnect

-  Plant



## La globalisation des chaînes d'approvisionnement et ses conséquences





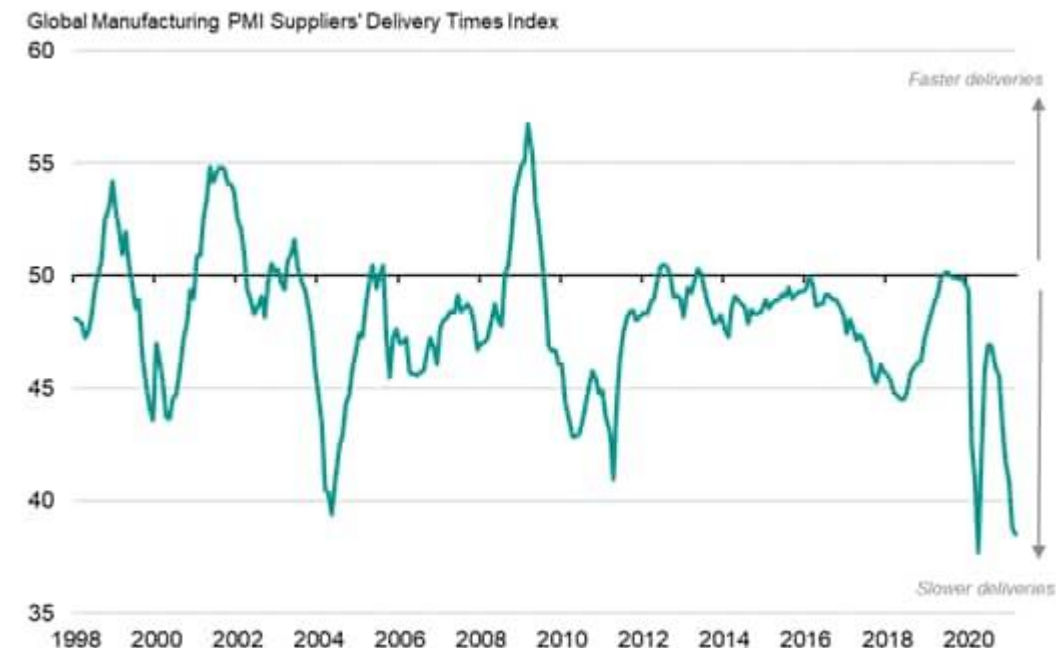
## Évolution du temps de livraison d'un conteneur 40 pieds

### PMI supplier lead times

| LEAD TIMES  | 03/20 | 04/20 | 05/20 | 06/20 | 07/20 | 08/20 | 09/20 | 10/20 | 11/20 | 12/20 | 01/21 | 02/21 | 03/21 | 04/21 | 05/21 | 06/21 | 07/21 | 08/21 | 09/21 | 10/21 | 11/21 | 12/21 | 01/22 | 02/22 | 03/22 |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Brazil      | 40.9  | 40.3  | 38.8  | 44.1  | 41    | 32.5  | 22.8  | 14.1  | 14.4  | 19.9  | 24.6  | 22    | 21.4  | 35.2  | 38.1  | 39.9  | 42.9  | 42.8  | 44.4  | 42.4  | 41.3  | 42.2  | 40.7  | 45    | 44.1  |
| Canada      | 34.6  | 24.9  | 30.9  | 37.5  | 39.5  | 37.4  | 38    | 37.4  | 34.2  | 32.7  | 34    | 34    | 28.7  | 30.5  | 29.2  | 30.2  | 32.9  | 28.6  | 25.3  | 23.1  | 24.4  | 28.7  | 27.8  | 26.8  | 24.8  |
| China       | 42.1  | 47.9  | 50    | 49.6  | 48.4  | 48.8  | 48.7  | 49.1  | 49.2  | 48    | 46.7  | 46    | 49.6  | 47.3  | 46.9  | 47    | 47.4  | 46.6  | 48.3  | 45.1  | 48.4  | 48.7  | 47.5  | 48    | 47.1  |
| Eurozone    | 34.2  | 25.1  | 37.3  | 45.4  | 47    | 47.7  | 43.9  | 42.9  | 37    | 34.4  | 31.6  | 25.6  | 22    | 20    | 18.5  | 19.1  | 20    | 22.8  | 22.4  | 19.4  | 21.7  | 25.3  | 26.6  | 31    | 25.2  |
| Germany     | 35.3  | 29    | 41.9  | 50.7  | 50.2  | 48.7  | 44.4  | 42.6  | 34.5  | 30.1  | 26.7  | 19.4  | 13.6  | 14    | 11.6  | 14.9  | 15.9  | 19.1  | 22.3  | 17.8  | 21.3  | 25.9  | 27.1  | 34    | 21.3  |
| India       | 49.6  | 29.5  | 44.3  | 45    | 46.4  | 47.6  | 48.5  | 49.3  | 49    | 48.6  | 49.5  | 50.2  | 48.7  | 49.6  | 48.1  | 48.7  | 48.5  | 48.5  | 48.6  | 49.1  | 47.9  | 48.5  | 48.8  | 49.5  |       |
| Indonesia   | 41.9  | 38.7  | 37.3  | 48.7  | 47.9  | 48.6  | 48.2  | 48.3  | 47.7  | 47.1  | 46    | 47.3  | 47.7  | 49.9  | 47.7  | 47    | 38    | 45.1  | 46.4  | 46.3  | 49.3  | 48.6  | 50.1  | 50.7  | 48.2  |
| Japan       | 42.7  | 40.1  | 41.2  | 46.7  | 47.3  | 47.1  | 47.5  | 48.3  | 47.6  | 47.8  | 46.8  | 46.9  | 42.5  | 42.6  | 43.7  | 41    | 40.8  | 39.5  | 38.3  | 37    | 37.7  | 37.1  | 37.8  | 38.1  | 37.5  |
| Russia      | 48.3  | 32.4  | 43.5  | 49.2  | 48.3  | 47.3  | 47.4  | 47    | 47.1  | 46.5  | 46.4  | 46.3  | 45.3  | 45.3  | 44.2  | 44.8  | 46.1  | 46.8  | 46.9  | 43.3  | 45.3  | 44.1  | 45.3  | 44.1  | 30.4  |
| Korea       | 40.7  | 38.4  | 43.4  | 45    | 46.4  | 46.9  | 45.3  | 47.4  | 47.6  | 44    | 42.5  | 42.4  | 42.6  | 44    | 43.5  | 43.3  | 44.8  | 44.4  | 41.7  | 43.5  | 39.7  | 38.8  | 41.3  | 41.3  | 44.9  |
| Switzerland | 25.7  | 29.1  | 44.1  | 50.4  | 47.7  | 47.5  | 44.3  | 39.2  | 36.9  | 32.5  | 22.3  | 24.5  | 14.3  | 14.2  | 11    | 13.5  | 11.9  | 14.5  | 11.4  | 16.2  | 17.4  | 23.7  | 22    | 25.1  | 23.2  |
| UK          | 33    | 16    | 27.3  | 32.8  | 43.4  | 42.1  | 41.6  | 38.1  | 33    | 27.9  | 22.3  | 22.5  | 21.7  | 22.2  | 19.8  | 18.4  | 21.2  | 17.4  | 19.3  | 18.3  | 21.4  | 23.8  | 30.4  | 31.7  | 33.4  |
| USA         | 40.1  | 35.6  | 36.9  | 42.8  | 47.2  | 45.8  | 43.7  | 42.7  | 37    | 32.5  | 33.4  | 27.1  | 26    | 24.3  | 25.5  | 17.2  | 16.5  | 16.8  | 16.6  | 16.8  | 18.9  | 24.4  | 23.2  | 25    | 28.5  |

Last data point: 31.03.2022, Source: Bloomberg, PMI Premium, Credit Suisse

### Chart 1 Global PMI suppliers' delivery times index



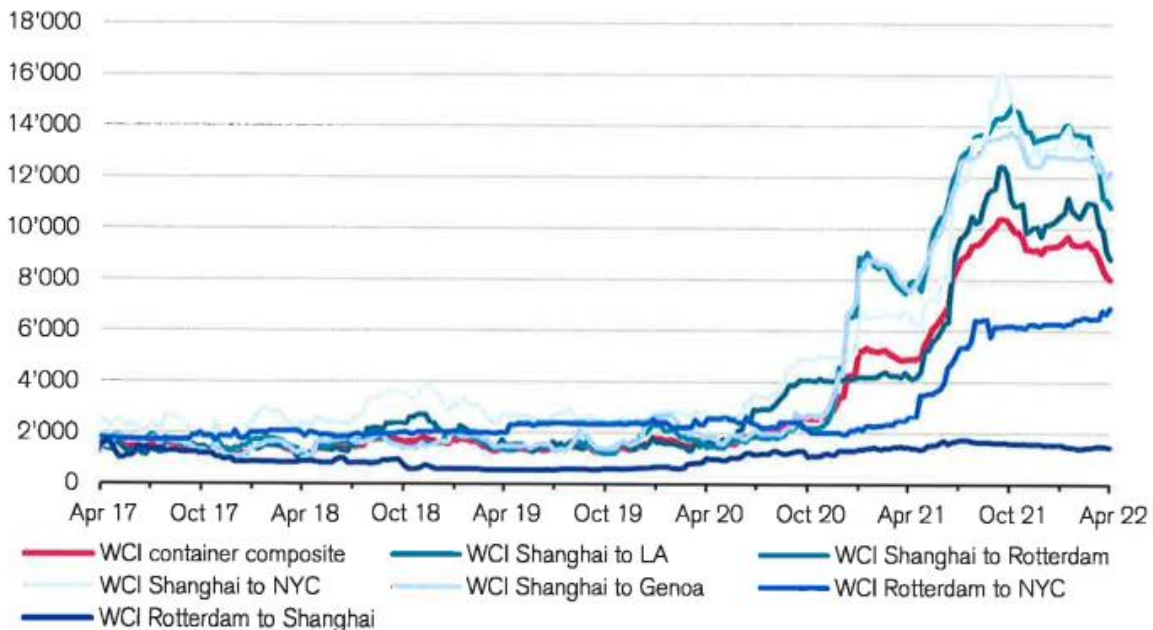
Sources: IHS Markit, JPMorgan.



## Évolution du cout de transport d'un conteneur 40 pieds et par tonne d'acier

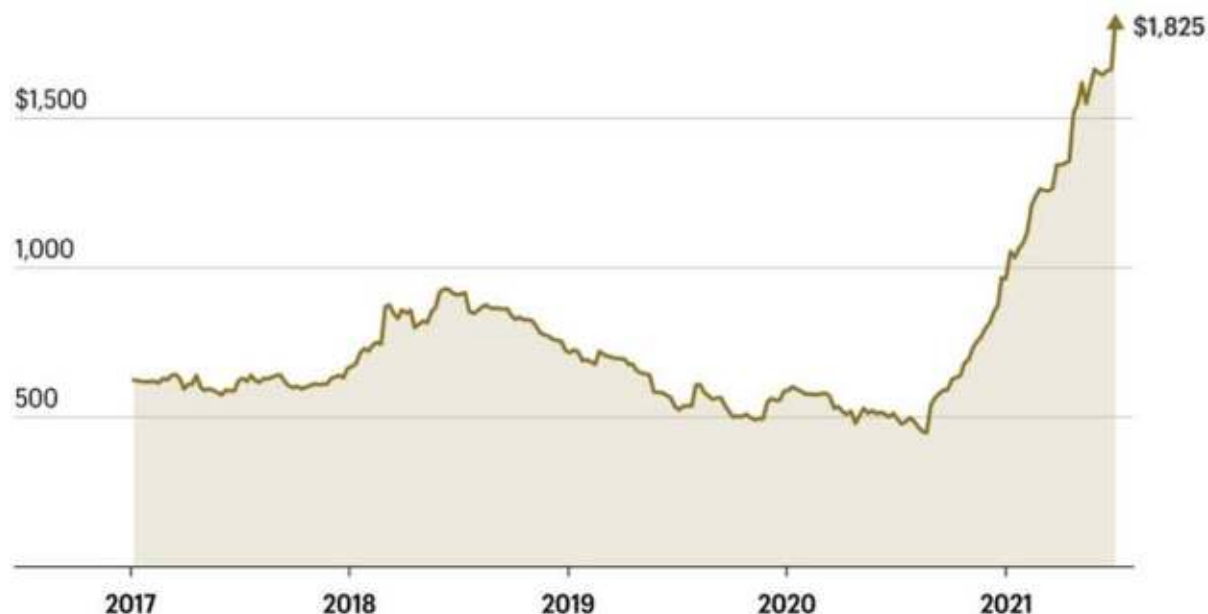
### WCI container rates

USD / 40 ft box



Last data point: 07.04.22, Source: Bloomberg, Credit Suisse

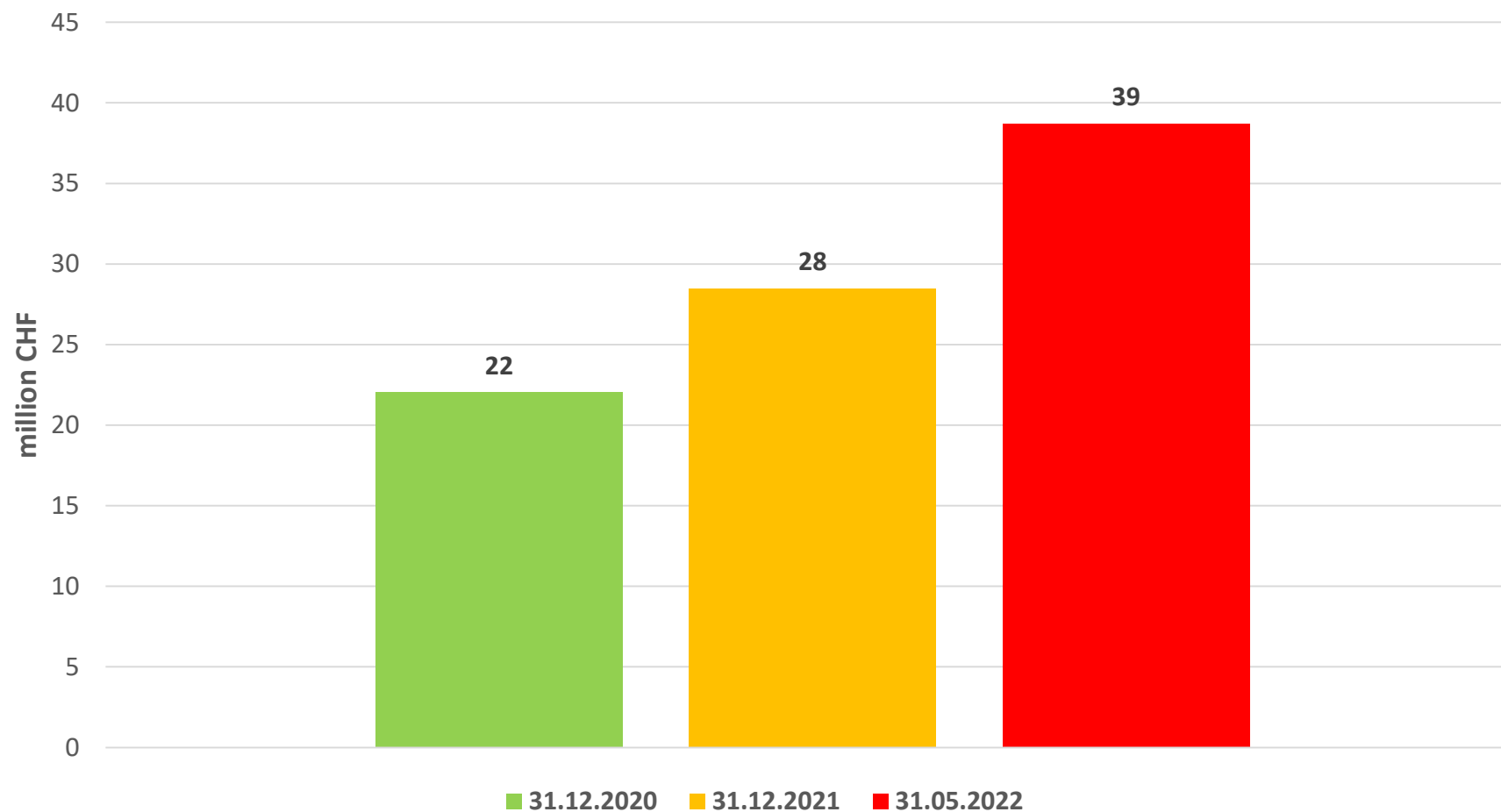
### INCREASE IN THE COST OF STEEL



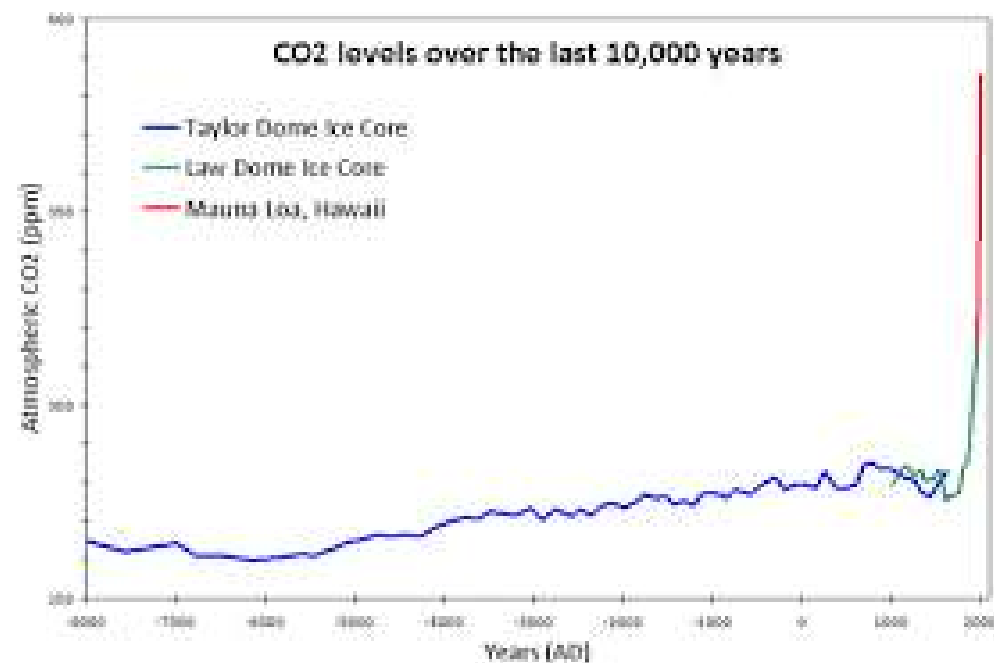
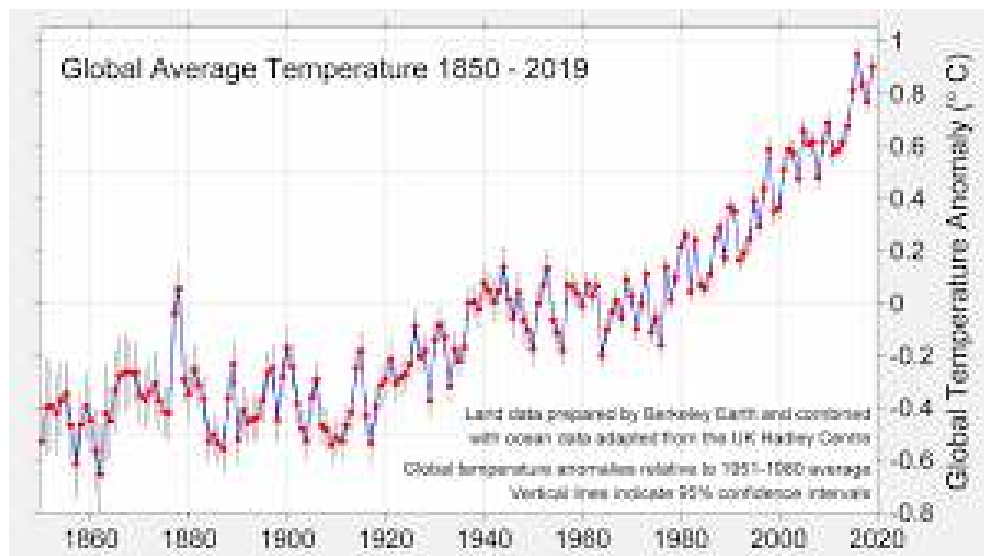
PLAAT: L'ANNEE LAURENT - COULDER: L'ANNEE LAURENT



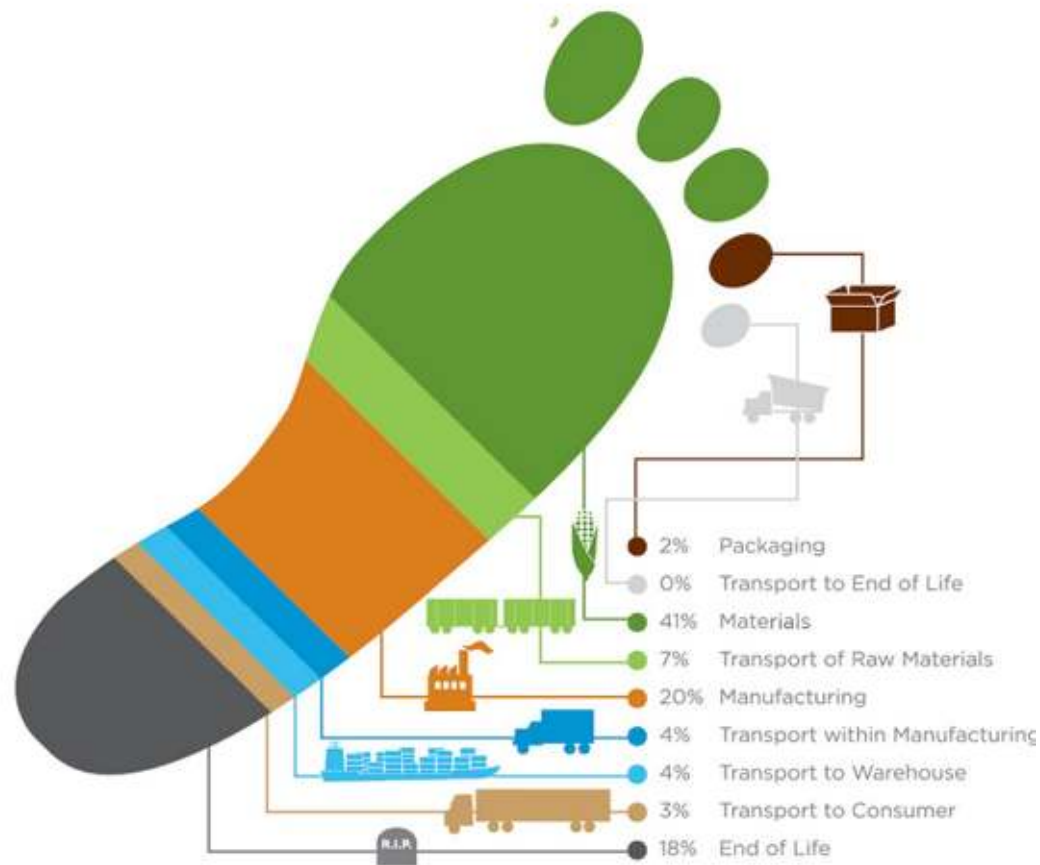
## valeur des matériaux en stock dans l'organisation globale Geobrugg







## Empreinte carbone des produits et des organisations – standard global?!





**Il faut rester « stoupe », stable et souple – merci pour votre attention!**

