

# Supply chain snapshot: uncovering opportunities despite disruption

12/05/2022   



Click the icons below for quick answers to some of the most common supply chain questions.



**What's disrupting supply chains globally?**



**How are broken supply chains affecting consumers and companies?**



**4 supply chain stories we're watching**



**Investors should think strategically about what supply chain issues mean to portfolios**



**Geopolitics are creating new flash points**

The invasion of Ukraine is an extreme example, but the emergence of two preeminent global ecosystems (centred around the US and China) could hasten supply chain reorganisations and even lead to reshoring.



**Covid-19 hit manufacturing, too**

A short-lived drop in demand caused manufacturers to scale back production. When demand picked up again, it was hard to keep pace, which pressured delivery times and prices.



**Deglobalisation in some sectors is gaining steam**

Amid ongoing trade disputes, protectionism is rising and countries are looking to be more selfsufficient. China is pushing consumer spending at home while continuing to promote its manufacturing prowess internationally.



**Other unexpected events**

Supply chains have been hit hard by severe floods in Europe, a winter storm in Texas and a six-day blockage of the Suez Canal, a major shipping artery.

 **DOWNLOAD AS A PDF**



**Learn more:** For more insights into supply chain disruption, read "**Unpacking opportunities from supply chain innovation**", available here: [www.allianzgi.com/supplychains](http://www.allianzgi.com/supplychains)

## Disclaimer



**Investing involves risk.** The value of an investment and the income from it will fluctuate and investors may not get back the principal invested. Investing in the water-related resource sector may be significantly affected by events relating to international political and economic developments, water conservation, the success of exploration projects, commodity prices and tax and other government regulations. Past performance is not indicative of future performance. This is a marketing communication. It is for informational purposes only. This document does not constitute investment advice or a recommendation to buy, sell or hold any security and shall not be deemed an offer to sell or a solicitation of an offer to buy any security.

The views and opinions expressed herein, which are subject to change without notice, are those of the issuer or its affiliated companies at the time of publication. Certain data used are derived from various sources believed to be reliable, but the accuracy or completeness of the data is not guaranteed and no liability is assumed for any direct or consequential losses arising from their use. The duplication, publication, extraction or transmission of the contents, irrespective of the form, is not permitted.

This material has not been reviewed by any regulatory authorities. In mainland China, it is used only as supporting material to the offshore investment products offered by commercial banks under the Qualified Domestic Institutional Investors scheme pursuant to applicable rules and regulations. This document does not constitute a public offer by virtue of Act Number 26.831 of the Argentine Republic and General Resolution No. 622/2013 of the NSC. This communication's sole purpose is to inform and does not under any circumstance constitute promotion or publicity of Allianz Global Investors products and/or services in Colombia or to Colombian residents pursuant to part 4 of Decree 2555 of 2010. This communication does not in any way aim to directly or indirectly initiate the purchase of a product or the provision of a service offered by Allianz Global Investors. Via reception of his document, each resident in Colombia acknowledges and accepts to have contacted Allianz Global Investors via their own initiative and that the communication under no circumstances does not arise from any promotional or marketing activities carried out by Allianz Global Investors. Colombian residents accept that accessing any type of social network page of Allianz Global Investors is done under their own responsibility and initiative and are aware that they may access specific information on the products and services of Allianz Global Investors. This communication is strictly private and confidential and may not be reproduced. This communication does not constitute a public offer of securities in Colombia pursuant to the public offer regulation set forth in Decree 2555 of 2010. This communication and the information provided herein should not be considered a solicitation or an offer by Allianz Global Investors or its affiliates to provide any financial products in Brazil, Panama, Peru, and Uruguay. In Australia, this material is presented by Allianz Global Investors Asia Pacific Limited ("AllianzGI AP") and is intended for the use of investment consultants and other institutional/professional investors only, and is not directed to the public or individual retail investors. AllianzGI AP is not licensed to provide financial services to retail clients in Australia. AllianzGI AP (Australian Registered Body Number 160 464 200) is exempt from the requirement to hold an Australian Foreign Financial Service License under the Corporations Act 2001 (Cth) pursuant to ASIC Class Order (CO 03/1103) with respect to the provision of financial services to wholesale clients only. AllianzGI AP is licensed and regulated by Hong Kong Securities and Futures Commission under Hong Kong laws, which differ from Australian laws.

This document is being distributed by the following Allianz Global Investors companies: Allianz Global Investors U.S. LLC, an investment adviser registered with the U.S. Securities and Exchange Commission; Allianz Global Investors Distributors LLC, distributor registered with FINRA, is affiliated with Allianz Global Investors U.S. LLC; Allianz Global Investors GmbH, an investment company in Germany, authorized by the German Bundesanstalt für Finanzdienstleistungsaufsicht (BaFin); Allianz Global Investors (Schweiz) AG; Allianz Global Investors Asia Pacific Ltd., licensed by the Hong Kong Securities and Futures Commission; Allianz Global Investors Singapore Ltd., regulated by the Monetary Authority of Singapore [Company Registration No. 199907169Z]; Allianz Global Investors Japan Co., Ltd., registered in Japan as a Financial Instruments Business Operator [Registered No. The Director of Kanto Local Finance Bureau (Financial Instruments Business Operator), No. 424, Member of Japan Investment Advisers Association and Investment Trust Association, Japan]; and Allianz Global Investors Taiwan Ltd., licensed by Financial Supervisory Commission in Taiwan.

Active is: Allianz Global Investors

Value. Shared.

### Our firm

Career

What we do

Our history

Our culture

Inclusion & diversity

Corporate responsibility

Art on climate

Sponsorships & Partnerships

Our experts

Our leadership team

Our offices

### Insights

Allianz Global Investors

Academy

Outlook & commentary

The Investment Intelligence

Podcast

Investable Themes

Appreciating China

Navigating Rates

### Capabilities

Equity

Fixed Income

Multi Asset

Private Markets

Sustainable Investing

Digital Investment Solutions

Development Finance

Research

risklab

### Press centre



Allianz Global Investors is comprised of the [AllianzGI Affiliated Entities](#) worldwide. Product availability will vary by jurisdiction.