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in progress

MESH Supply Chain Resilience Report 2025

Building trust and continuity
through supply chain maturity



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Introduction

In an era of global volatility, businesses are waking up to a hard truth: supply chains are no longer just cost centers or operational functions—they are strategic assets, risk multipliers, and reputational accelerators.

The MESH Supply Chain Resilience Report 2025 examines the maturity of supply chain risk and resilience programs across industries, using data collected through the [MESH Maturity Assessment tool](#). The findings highlight how organizations are (or aren't) adapting to disruption, where vulnerabilities persist, and what leading firms are doing differently.

Despite increasing investments in digital tools and sustainability reporting, many companies remain underprepared for the rising wave of shocks—ranging from geopolitical tension and ESG scrutiny to supplier instability and climate-linked disruption. Worse still, fragmented ownership and siloed functions continue to limit organizational visibility and agility.

MESH—short for Mapping, Evaluation, Strategy, and Harmonization—provides a structured framework to assess and improve an organization's supply chain resilience across eight critical dimensions. It encourages cross-functional coordination, long-term thinking, and operational continuity.

This report, based on aggregated MESH self-assessment data and market insights, identifies trends in maturity, investment patterns, and strategic gaps. It also makes the case for embedding resilience into every corner of the enterprise—from procurement to IT, logistics to legal, and from boardrooms to the front lines.

Supply chains are no longer invisible. Their weaknesses are in full view. The next phase of competitive advantage will belong to organizations that recognize resilience as a shared responsibility—and a catalyst for growth.

Executive summary

This inaugural MESH Supply Chain Resilience Report brings into focus a new maturity landscape for global organizations. Drawing on hundreds of responses to the MESH Maturity Assessment, the data reveals a clear gap between intent and implementation when it comes to supply chain resilience.

Key findings

- **Fragmented maturity:** Over 60% of organizations rated themselves as Basic or Ad Hoc across key resilience areas like supplier assurance, logistics continuity, and digital infrastructure. Just 6% achieved a Leading rating in more than one dimension.
- **Visibility lags strategy:** While 72% of respondents say resilience is a priority in board-level strategy, only 38% have comprehensive supplier mapping or end-to-end risk visibility.
- **Workforce capability is a blind spot:** Less than a third of firms report regular training or defined accountability structures for supply chain risk management across departments.
- **Disruption fatigue is real:** More than half of firms experienced a material supply chain disruption in the past 12 months. Yet fewer than 40% have updated or tested their business continuity plans in the same timeframe.

- **Investment ≠ integration:** Average spending on resilience initiatives is rising, but many programs remain siloed—limited to procurement or compliance functions rather than being embedded across the business.
- **The MESH model offers a new lens to move beyond reaction and toward integration—**shifting organizations from a passive to a proactive stance in the face of accelerating risk.

This report aims to:

- Benchmark current maturity levels,
- Surface best practices from leading firms,
- And serve as a call to action for those looking to future-proof their supply chains.

The message is clear: resilient supply chains are not built during a crisis—they're built in advance, through alignment, planning, and continuous improvement.

Supply chain risks on the rise



A new era of exposure, complexity and disruption

For many organizations, the past year has felt like a series of rolling disruptions. From geopolitical shocks and extreme weather events to regulatory tightening and transportation gridlocks, supply chain leaders are navigating a risk environment that is no longer cyclical – but continuous.

More than half (54%) of MESH respondents reported experiencing a significant supply chain disruption in the past 12 months. Yet fewer than 1 in 3 had the systems, data, or response structures in place to mitigate the downstream impact in real time.

This rise in exposure reflects not just external shocks but internal maturity gaps. Many businesses continue to treat supply chain resilience as an operational issue rather than an enterprise-level risk.



Key disruption factors reported:

48%

cite unreliable or failing suppliers as the root cause

35%

point to ESG-related scrutiny and evolving compliance rules

41%

identify transport bottlenecks, particularly across borders

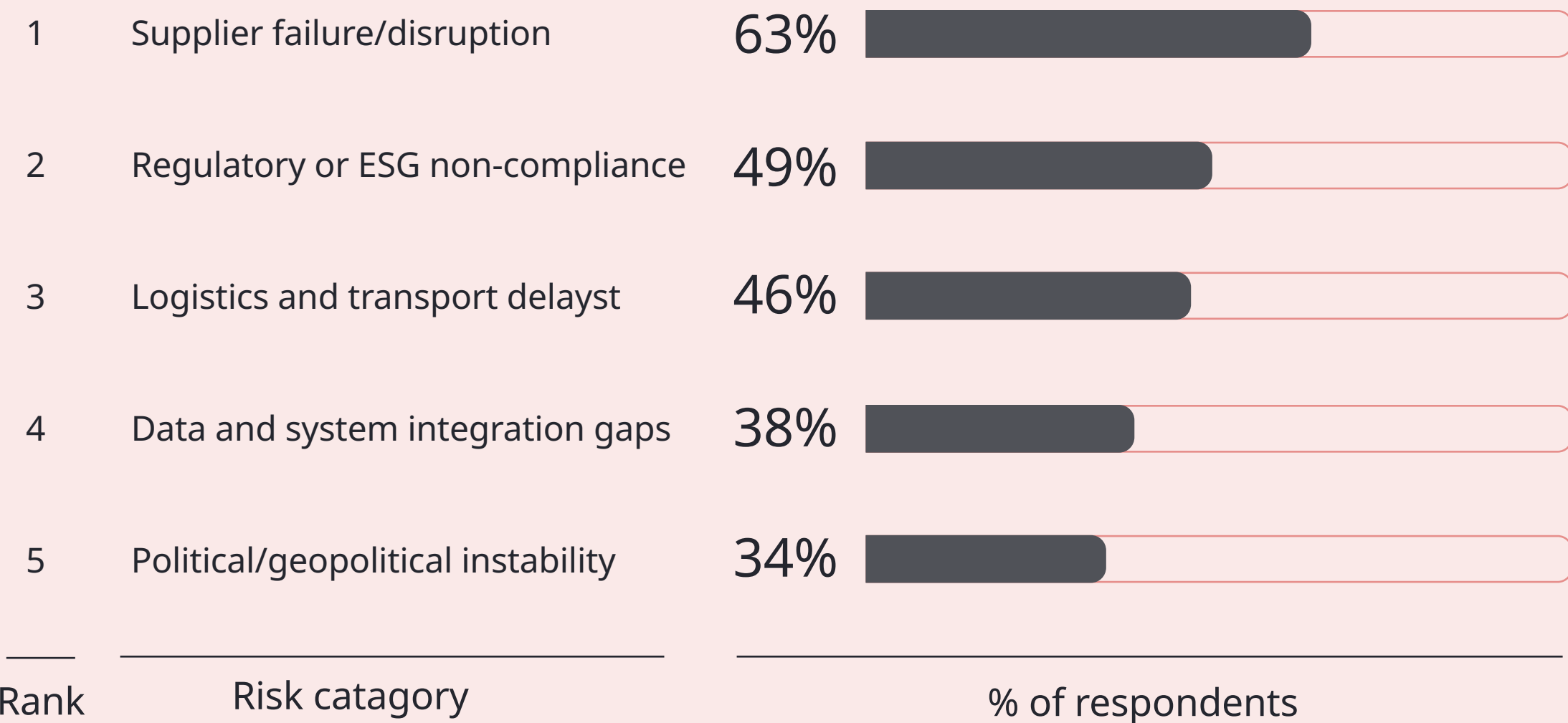
31%

experienced delays linked to workforce or contractor shortages

38%

report limited upstream visibility into Tier 2+ suppliers

What organizations say are their top perceived supply chain risks in 2025:



Despite widespread awareness, **only 29% of firms** have a formal supply chain risk register. And just **22%** say their risk mitigation plans are tested or updated more than once a year.

The takeaway: supply chain risk is no longer theoretical—it’s persistent, tangible, and rapidly evolving. Yet many organizations remain stuck in reactive mode, limiting their ability to adapt and protect their core operations.

MESH aims to change this by offering a structured, diagnostic model that helps organizations move from blind spots to benchmarks—and from exposure to resilience.

Supply chain risk is no longer theoretical – it’s persistent, tangible, and rapidly evolving



The reputational cost of fragility



Why resilient supply chains are now brand-critical

It's no longer just about lost shipments or production delays. Supply chain breakdowns increasingly carry a reputational cost—damaging trust with customers, investors, and regulators alike.

In the age of heightened transparency, organizations are expected to know—and be accountable for—the integrity of their full value chain. A supplier's environmental violation, a labor rights scandal in Tier 3, or a missed delivery tied to an unvetted logistics partner can quickly become headline risk.

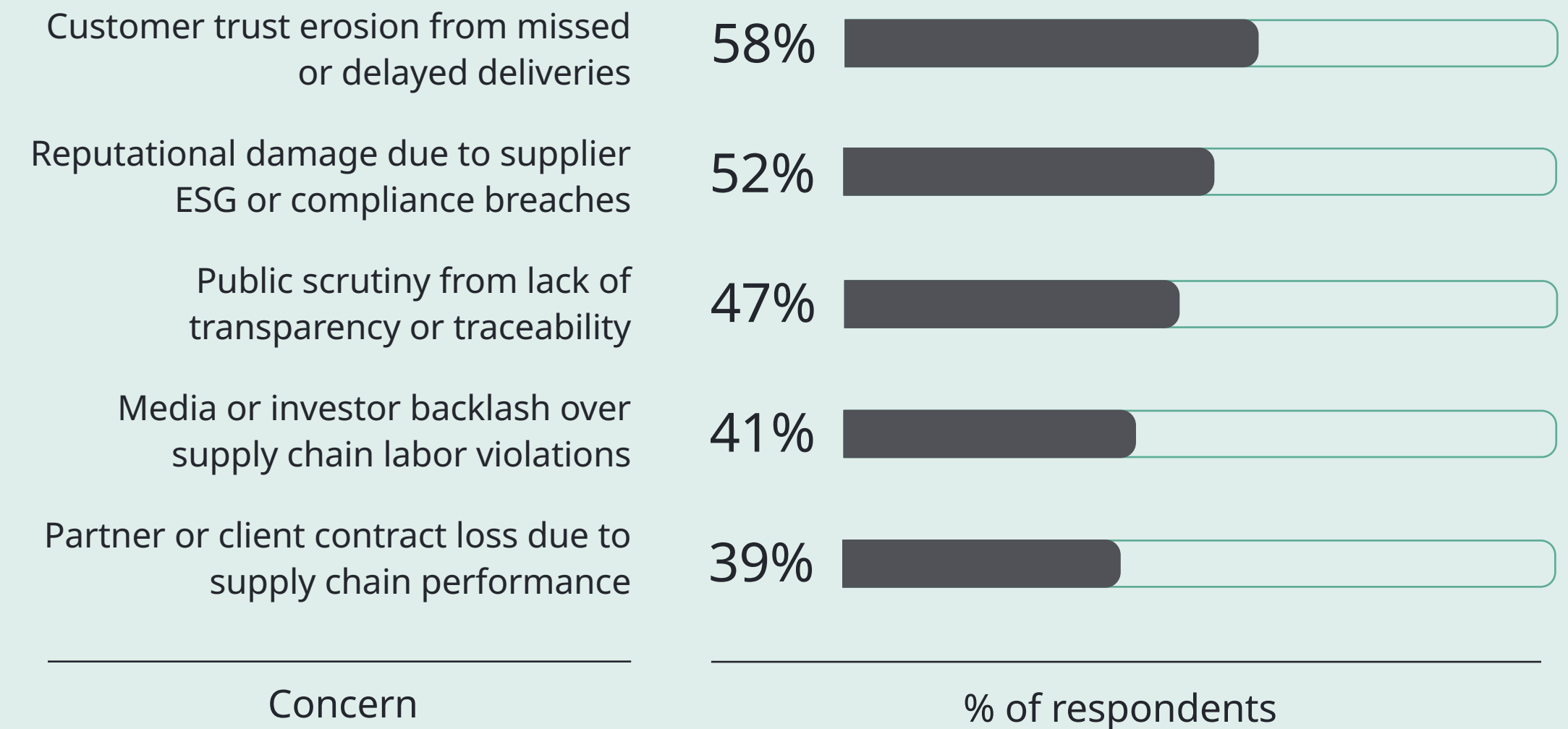
Six in ten MESH respondents (61%) agree that a significant supply chain failure would have a material impact on their reputation. Yet only **36%** believe their current supply chain oversight is sufficient to detect and prevent these reputational threats.

One of the most underappreciated risks is the **perception of unpreparedness**. In stakeholder eyes, it's not only the disruption that matters—it's how visible, accountable, and responsive a company appears when facing it.

Organizations that cannot quickly identify the root cause of a failure, demonstrate oversight of their suppliers, or articulate recovery steps risk being seen as negligent—even if the issue began externally.

In this landscape, **supply chain maturity is brand insurance**. Organizations with high MESH scores across Supplier Assurance, Governance, and Digital Infrastructure report faster recovery times, fewer reputational incidents, and stronger client retention after a disruption.

The top reputational concerns linked to supply chain fragility:





“In an interconnected world, reputational risk travels as fast as your slowest supplier.”

— Senior Supply Chain Executive, MESH Interview Panel

The human factor in resilience



People are the supply chain's greatest strength – and its weakest link

Even the most advanced risk systems and digital dashboards can't substitute for empowered, informed people. Yet most supply chain resilience gaps can be traced not to tools or technology—but to human issues: lack of ownership, poor cross-functional alignment, and limited capability to anticipate or respond.

While many organizations are investing in platforms and analytics, **only 28% of MESH respondents** report having clear accountability for supply chain risk embedded across business units. Even fewer—**just 21%**—say that supply chain risk is regularly discussed beyond procurement or compliance teams.

The MESH assessment reveals a consistent pattern: **organizations that score higher on the Workforce Capability and Culture dimension** are far more likely to identify

early risks, coordinate recovery efforts quickly, and retain key customers after disruption.

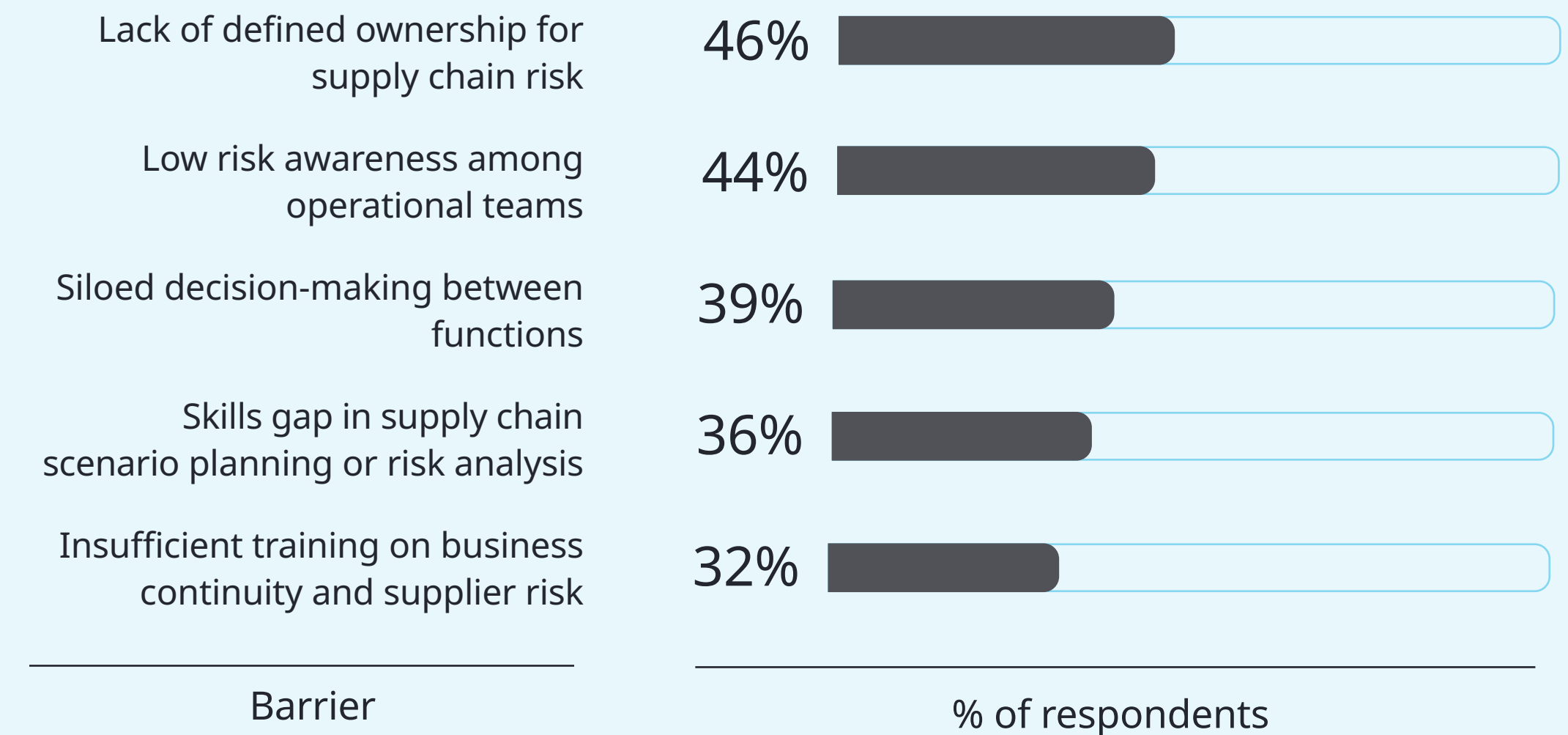
But capability-building isn't just about formal training—it's about creating a **culture of resilience**:

- Do people understand their role in risk identification and escalation?
- Are cross-functional teams engaged in continuity planning?
- Is supply chain maturity seen as a shared goal, or a specialist concern?

The gap is cultural as much as technical.

Addressing the human factor isn't optional—it's foundational. True resilience comes when every level of the business understands that risk lives everywhere—and so does accountability.

Top human-capability barriers to supply chain resilience



“When everyone thinks risk is someone else’s problem, you’re already exposed.” — MESH Assessment Participant, Global Manufacturing Firm

Disruptive forces and emerging tools



Technology is reshaping the risk landscape – but so is how we use it

Supply chains are digitizing fast. AI-powered planning, IoT-enabled tracking, blockchain transparency, and predictive analytics are rapidly becoming standard. Yet, adoption alone doesn't guarantee resilience.

In fact, **41% of MESH respondents** say the complexity introduced by new technologies has increased their exposure to risk—due to misalignment, undertrained teams, or integration gaps between legacy systems and modern tools.

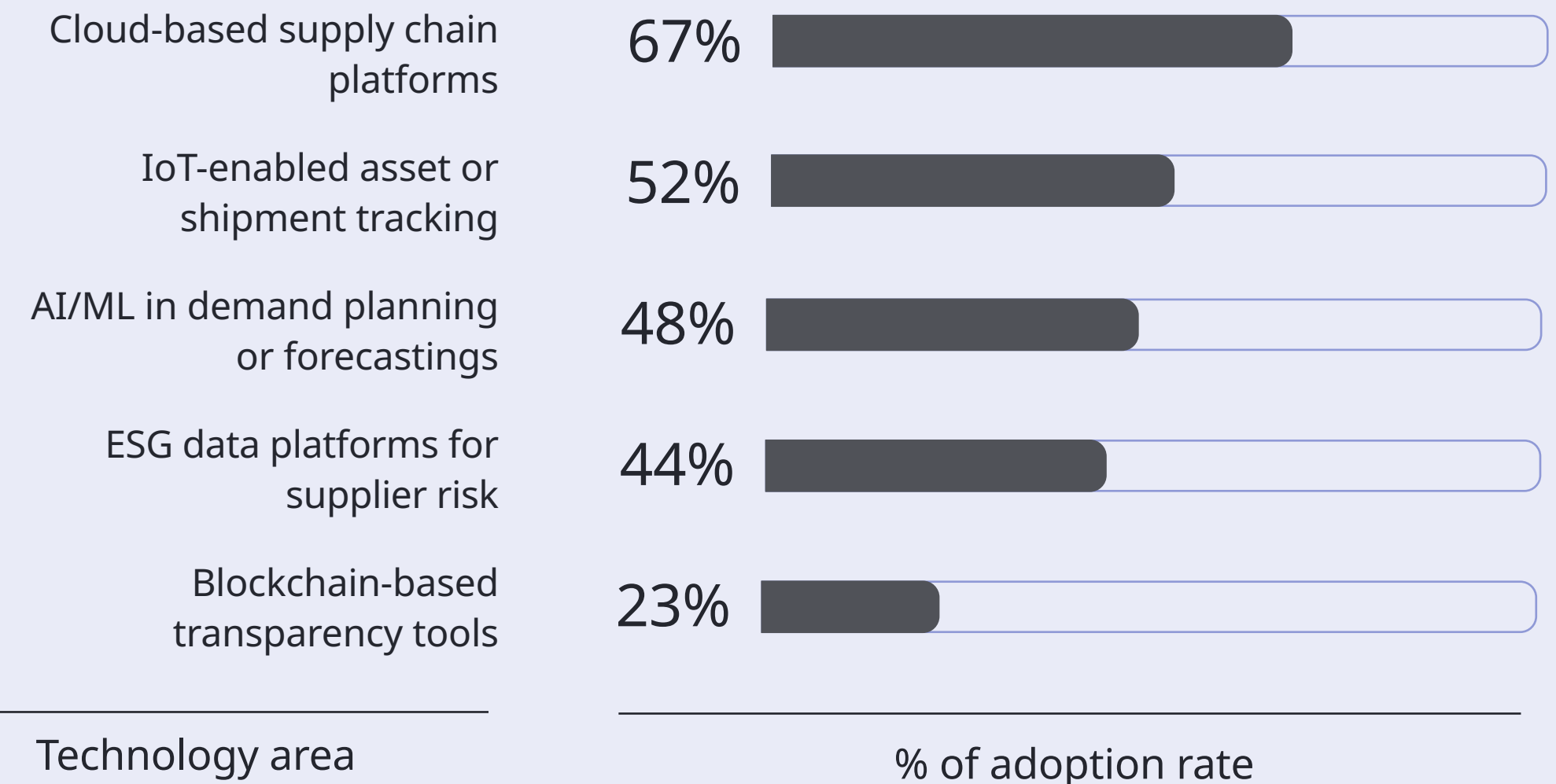
While many firms are investing in supply chain tech, fewer are aligning it with their risk and resilience goals. Technology is often deployed for cost or efficiency—less so for continuity, scenario planning, or adaptive response.

At the same time, risks are evolving:

- AI-generated demand signals can amplify errors in forecasting.
- IoT systems increase the digital attack surface.
- ESG compliance platforms can flag risk – but only if connected to real-time supplier data.

Only 35% of organizations said they felt “highly confident” in the quality and integration of their supply chain data.

Top emerging technologies in use by MESH-assessed organizations:



What sets digital leaders apart?

Firms that score “Advanced” or “Leading” in MESH’s Digital Infrastructure and Data Integration dimension tend to:

- Use real-time data in supplier risk management
- Cross-reference ESG, logistics, and financial data for decision-making
- Align tech investment with business continuity goals
- Design systems that support scenario testing and rapid reconfiguration

The lesson: resilience is not about owning the latest tech. It’s about using the right tools with the right people – connected, contextualized, and coordinated.

“Visibility is the new currency of trust – but only when systems talk to each other and to the people who make the decisions.”

– Supply Chain Digital Transformation Lead, MESH Respondent



Maturity levels across the MESH framework

How organizations measure up —and where the biggest gaps lie

The MESH Supply Chain Maturity Assessment provides a structured, diagnostic approach to evaluating an organization's resilience across eight interdependent dimensions. Each dimension is scored on a five-level maturity scale—from Basic to Leading—based on self-assessed practices, structures, and capabilities.

The eight core dimensions:

- 1 Organizational Governance and Strategic Alignment
- 2 Supply Chain Visibility & Mapping
- 3 Risk Management and Business Continuity Planning
- 4 Supplier Assurance and Performance Management
- 5 Logistics and Transportation Resilience
- 6 Digital Infrastructure and Data Integration
- 7 Regulatory Compliance and Ethical Standards
- 8 Workforce Capability and Culture



The MESH maturity scale

| Level | Description |
|--------------------|---|
| Basic | Ad hoc, informal practices. No formal risk processes or ownership structures. |
| Ad Hoc | Some processes in place, but inconsistent. Limited integration or documentation. |
| Established | Formal processes, periodic reviews, moderate awareness and response readiness. |
| Advanced | Cross-functional coordination, regular testing, embedded into operations. |
| Leading | Fully integrated strategy, continuous improvement, recognized as a competitive advantage. |

Average Maturity Distribution by Dimension (% of respondents per level)

| Dimension | Basic | Ad Hoc | Established | Advanced | Leading |
|---|-------|--------|-------------|----------|---------|
| Governance and strategic alignment | 11% | 28% | 39% | 18% | 4% |
| Supply chain visibility and mapping | 19% | 34% | 29% | 15% | 3% |
| Risk management and business continuity | 14% | 31% | 33% | 18% | 4% |
| Supplier assurance and performance | 17% | 38% | 28% | 14% | 3% |
| Logistics and transportation resilience | 13% | 35% | 33% | 16% | 3% |
| Digital infrastructure and data integration | 22% | 29% | 28% | 16% | 5% |
| Regulatory compliance and ethical standards | 10% | 25% | 36% | 24% | 5% |
| Workforce capability and culture | 18% | 33% | 29% | 16% | 4% |

Key insights

The most common maturity level across all dimensions is **Ad Hoc** (30–38%), indicating that many organizations have partial programs without consistent execution.

Digital Infrastructure has the highest percentage of respondents in the Basic tier, revealing a widespread disconnect between tech adoption and resilience integration.

Very few organizations reach the **Leading** tier across any dimension—suggesting a significant opportunity for competitive differentiation through resilience leadership.

This maturity benchmark is not a scorecard—it's a springboard. It gives organizations a way to prioritize investments, measure improvement, and communicate progress to stakeholders.



“The assessment shows us what we’ve long suspected—most supply chain risk programs are only mature on paper.” – COO, Multinational Manufacturing Firm

Investing in resilience



Why leading firms treat supply chain maturity as a long-term asset, not a short-term fix

As risk exposure increases and reputational stakes rise, more companies are allocating budget to supply chain resilience. But spending alone doesn't equal impact—what matters is where and how that investment is made.

According to MESH assessment respondents, 81% of organizations plan to increase their supply chain risk and resilience investment over the next 12 months. However, only 32% have a cross-functional budget tied to supply chain resilience—suggesting that most funding still flows through siloed functions like procurement, compliance, or IT.

Average % of operational or IT budget allocated to resilience-related initiatives:

| No. of employees | | % of budget spent |
|------------------|--|-------------------|
| 1-50 | | 7% |
| 51-250 | | 6% |
| 251-999 | | 5% |
| 1,000+ | | 4% |

Note: Includes investments in business continuity planning, supplier audits, risk platforms, training, and sustainability assurance.



Where are high-maturity firms spending?

Organizations scoring Advanced or Leading in the MESH framework tend to allocate their resilience budgets differently. Compared to Basic and Ad Hoc firms, they:

Spend **2-3x more** on scenario testing and simulation tools

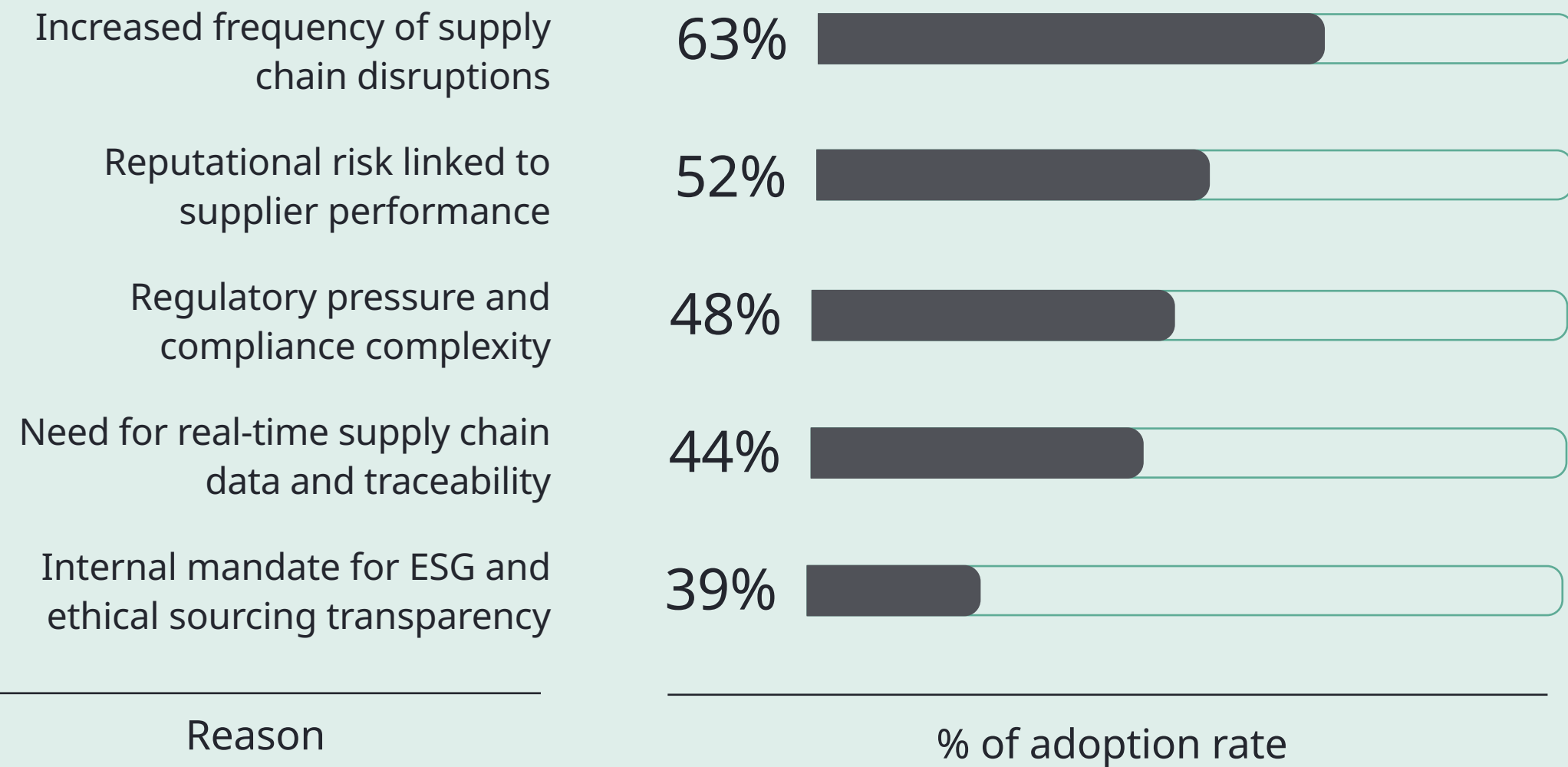
Invest in **integrated platforms** that connect ESG, risk, and procurement data

Fund **cross-functional training and stakeholder engagement programs**

Direct budget toward **early-stage supplier onboarding and assurance**

Prioritize **governance structure** reviews and board-level risk reporting

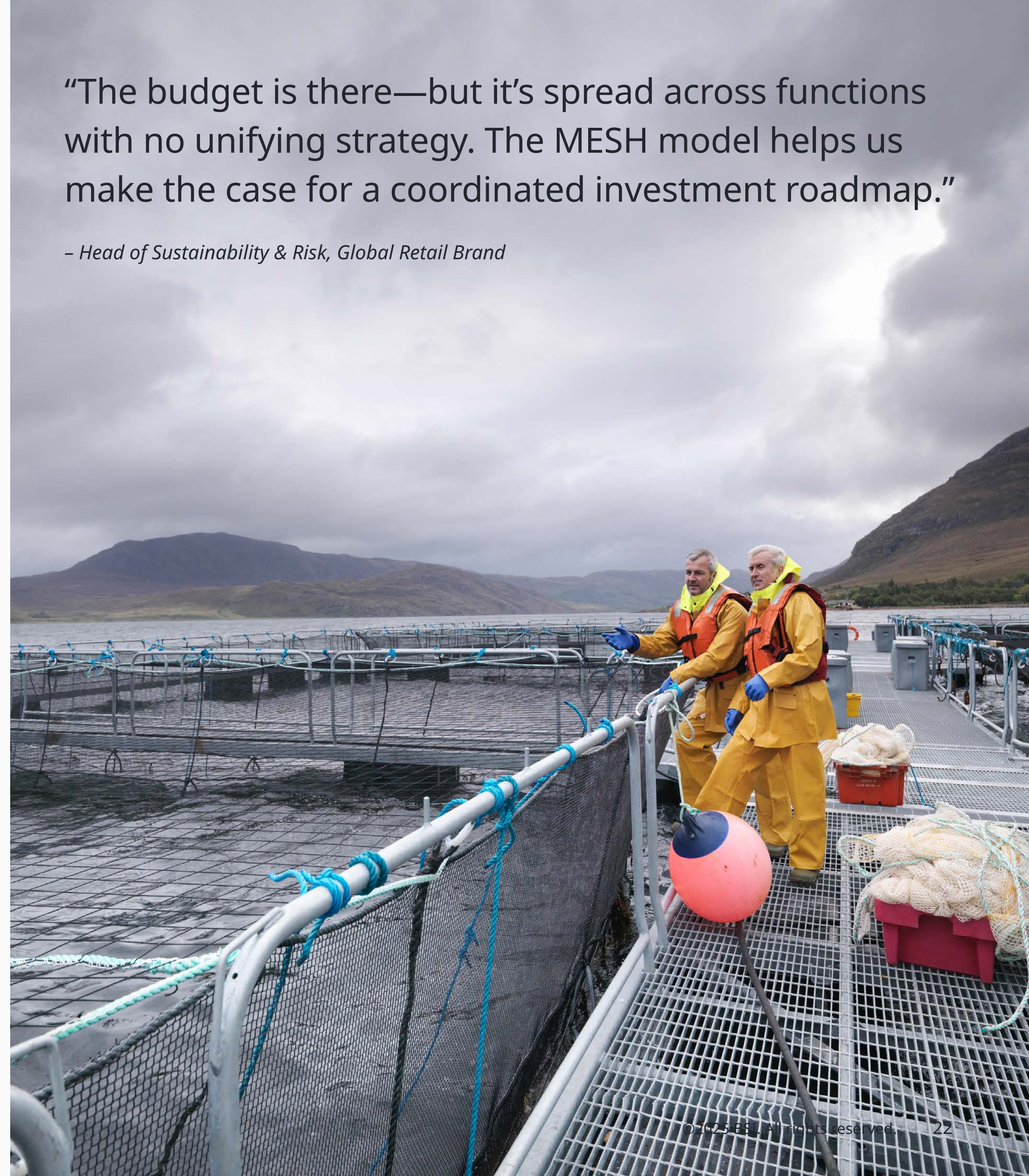
Top justifications for increased investment (from MESH respondents):



Companies with higher maturity don't just spend more—they **spend smarter**. They view resilience not as insurance against disruption, but as **an enabler of continuity, trust, and long-term advantage**.

“The budget is there—but it’s spread across functions with no unifying strategy. The MESH model helps us make the case for a coordinated investment roadmap.”

– Head of Sustainability & Risk, Global Retail Brand



Enabling supply chain maturity

From insight to action – how organizations operationalize resilience

A maturity assessment alone won't make a supply chain resilient. The real transformation begins when organizations take those insights and convert them into sustained action—embedding risk thinking into day-to-day operations, decision-making, and culture.

That's where the MESH program stands apart. It's not just a diagnostic—it's a roadmap.

Organizations that achieve measurable gains in their MESH scores do three things differently:

- 1 They connect their maturity gaps to specific improvement plans.
- 2 They use platforms like BSI Connect to operationalize change.
- 3 They treat resilience as a cross-functional capability—not just a supply chain issue.

The role of BSI Connect in enabling maturity

BSI Connect provides the digital infrastructure to move organizations from maturity insight to ongoing improvement. Through features like:

- **Checklists and Guidance Libraries** tailored to MESH dimensions
- **Supplier and site-level assurance tools**
- **Digital self-assessments and benchmarking dashboards**
- **Collaboration spaces** for internal and external partners
- **Automated reporting** to align with ESG, ISO, and regulatory frameworks

... organizations gain the structure, **visibility, and repeatability** they need to shift from ad hoc improvement to embedded resilience.

From one-off project to enterprise mindset

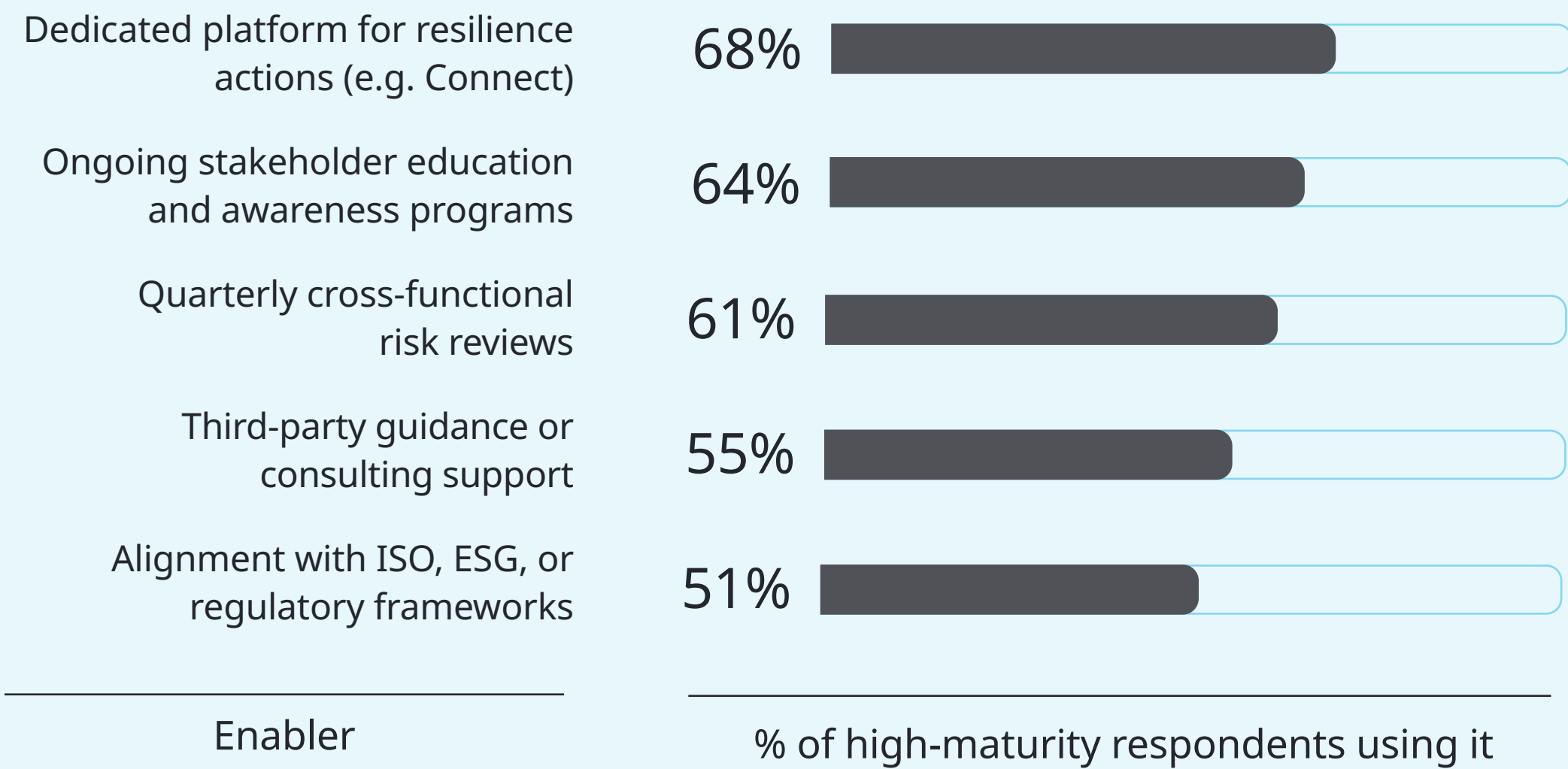
One of the most common patterns among Established and Advanced organizations is a shift in language and behavior:

- Risk becomes a shared vocabulary across supply chain, finance, IT, legal, and sustainability teams
- Leadership mandates support not just compliance, but **continuous improvement**
- Progress is monitored not just via lagging KPIs, but also **leading indicators of risk readiness**

“We used the MESH assessment to get a baseline—but Connect gave us the mechanism to actually build capability. It's now part of how we run our business.”

— Global Supply Chain Director, Automotive Tier 1 Supplier

Key enablers of maturity acceleration:



Supply chain resilience doesn't live in a binder. It lives in the tools, decisions, and culture of the organization. Platforms like Connect help make resilience visible—and actionable.



Methodology

How we built the MESH Supply Chain Maturity data set

This report is based on data collected through the MESH Supply Chain Maturity Assessment, a structured self-assessment tool developed to evaluate an organization's resilience across eight key dimensions aligned with ISO 31000, ISO 22301, and ISO 65000 standards.

About the MESH Assessment

- Launched: 2025
- Format: Digital questionnaire
- Response format: 5-point Likert scale, scored 1 (lowest) to 5 (highest)
- Output: Thematic maturity score + detailed, narrative report tailored to organization's self-reported responses

Each participant receives a maturity score per dimension, as well as an overall score, with corresponding guidance to interpret their current level and next-step actions.

MESH Scoring Bands

| Score range | Maturity level | Description |
|-------------|----------------|---|
| 1-10 | Basic | Ad hoc, informal practices. No formal risk processes or ownership structures. |
| 11-40 | Ad hoc | Some practices exist, but inconsistently applied. |
| 41-70 | Established | Documented and periodically reviewed practices. |
| 71-90 | Advanced | Integrated, cross-functional systems in place. |
| 91-100 | Leading | Fully embedded, benchmarked, and continuously improved. |

Scores are normalized and averaged across eight dimensions to produce an overall maturity level. Narrative outputs are auto-generated to summarize key strengths and gaps per category.

Data collection summary (2025 Pilot Year)

| Attribute | Detail |
|------------------------------|---|
| Number of assessments | 240+ (as of July 2025) |
| Industries represented | Manufacturing, Healthcare, Tech, Retail, Logistics, Food & Bev. |
| Company size range | From SMEs (<50 employees) to multinationals (>5,000 employees). |
| Regions covered | North America, UK & EU, Asia-Pacific (selected). |
| Data cleaning and validation | Responses filtered for completion & duplicates removed |

Limitations

- Self-assessment nature may introduce bias or optimistic responses
- Pilot data set may underrepresent certain sectors or geographies
- Scoring is standardized but not externally audited

Future editions of the MESH report will include year-over-year benchmarking, expanded sector segmentation, and potentially third-party verified scoring for advanced cohorts.



Acknowledgments

This report was developed in collaboration with:

- The BSI MESH Program Team
- Commercial and Platform Teams at BSI Connect
- Participating organizations who piloted the 2025 MESH Assessment
- Risk and Resilience Advisors contributing sector insights

Final note

The journey to supply chain resilience is not one of perfection – but of progress.

MESH exists to help you map where you are, design where you want to go, and track how you'll get there.

Take the MESH Maturity Assessment to benchmark your organization and receive a personalized report with practical next steps.

[Start assessment](#)

Resources

References and Data Sources

[MESH Maturity Assessment Pilot Data, BSI, 2025.](#)

[ISO 31000: Risk Management – Principles and Guidelines.](#)

[ISO 22301: Business Continuity Management Systems – Requirements.](#)

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[Deloitte Global Manufacturing Outlook 2024 – Workforce and Risk Priorities.](#)

[Hiscox Cyber Readiness Report 2024 – Referenced for structure and narrative tone.](#)



Disclaimer

Please note, to safeguard our impartiality, BSI is unable to provide consulting services to clients to whom we provide certification services. Likewise, we are not able to provide certification services to clients to whom we are currently providing consultancy services until three years after our consultancy services have ended.



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