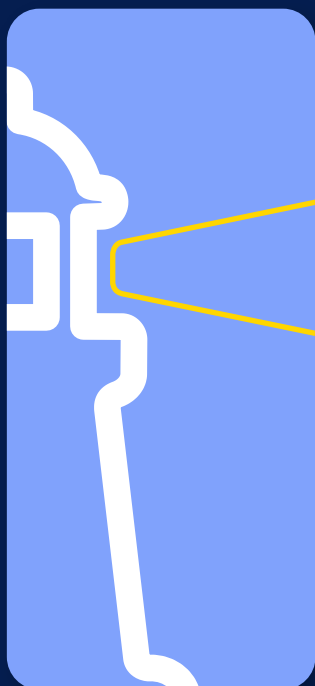
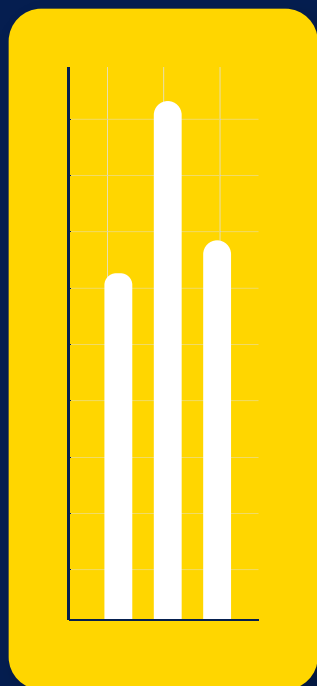
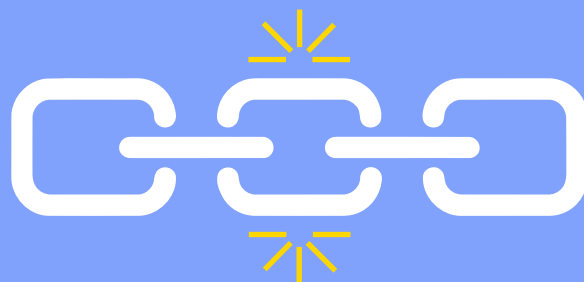


Uptime Index

The Supply Chain Reaction

How European manufacturers are protecting reputation against unstable supply chains

September 2026



Foreword

by David Cullern, Group VP, Key Accounts, Rubix

Across Europe, manufacturers are operating in a supply chain that refuses to sit still. Costs keep climbing, critical parts can be delayed, and the geopolitical backdrop offers little sign of calming down. Uncertainty has become the norm.

In this wave of the Rubix Uptime Index, we turn to supply chain resilience and understanding what happens when the parts a factory depends on can't be found. The consequences rarely stop at the storeroom. A late part becomes a missed delivery. And a missed delivery puts at risk the hardest thing to rebuild: a manufacturer's reputation.

That is where Rubix comes in: helping manufacturers secure the parts, stock and expertise they need to keep the promises they make to customers, whatever the supply chain throws at them. The businesses pulling ahead aren't waiting for stability to return. They're building supply chain resilience in its absence.



Scan the QR code to watch David's personal introduction to the latest Uptime Index.

About the research

Context and objectives

The Rubix Uptime Index provides a periodic health check on the performance of European manufacturing. It tracks confidence across manufacturers today – revealing how well they're keeping production lines running, how much they're investing in the future of their companies, and how well they are responding to issues causing costly machine downtime across the sector. It highlights how the picture is shifting in manufacturing, what's driving decision-making and what it means for manufacturers' ability to protect uptime.

Supply chain reaction

In this wave of the Uptime Index, we turn to one of the most persistent threats to machine uptime: supply chain.

We wanted to understand how European manufacturers are experiencing pressures today, which products and businesses feel them most, and what leading operators are doing in response.

Method

We partnered with market research agency *We Live Context* to develop the Rubix Uptime Index. As with our last survey, the Uptime Index analyses confidence across four key areas: *Operations*, *Business*, *Supply*, and *Skills*.

To get beneath the numbers, we combined our survey of manufacturing professionals across Europe with in-depth interviews, drawing on the day-to-day experience of the plant managers, engineers and procurement teams living with these challenges.

Sample

Our research is drawn from a community of 60,000 manufacturing professionals across 12+ European markets, followed up with in-depth customer interviews for further context.





The Uptime Index



The Uptime Index

The Uptime Index has climbed four points, from 75 to 79, continuing the steady upward trend of recent waves.

This rise doesn't reflect an improvement in conditions. It shows that businesses are getting better at absorbing shocks, securing the parts they need and protecting uptime in challenging conditions.

Rubix Uptime Index for
September 2026:

79

Most telling for this wave, confidence in accessing the right spare parts at a fair price has held firm. It suggests the mitigations manufacturers are using, like stockholding critical parts, bringing supply closer and consolidating suppliers, are working. Businesses have stopped waiting for the supply chain to settle and started working around it.

Confidence in long-term investment is slightly lower, reflecting understandable caution in an unstable climate.

Skilled staff remains the weakest link, the same structural drag identified in earlier waves, and a reminder that no amount of supply chain discipline fully offsets a shrinking pool of expertise.



Ultimately, that's what the score measures: not whether the pressure has eased, but how confident manufacturers are that they can keep their promises to customers.

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Protecting Reputations in an Unstable Supply Chain



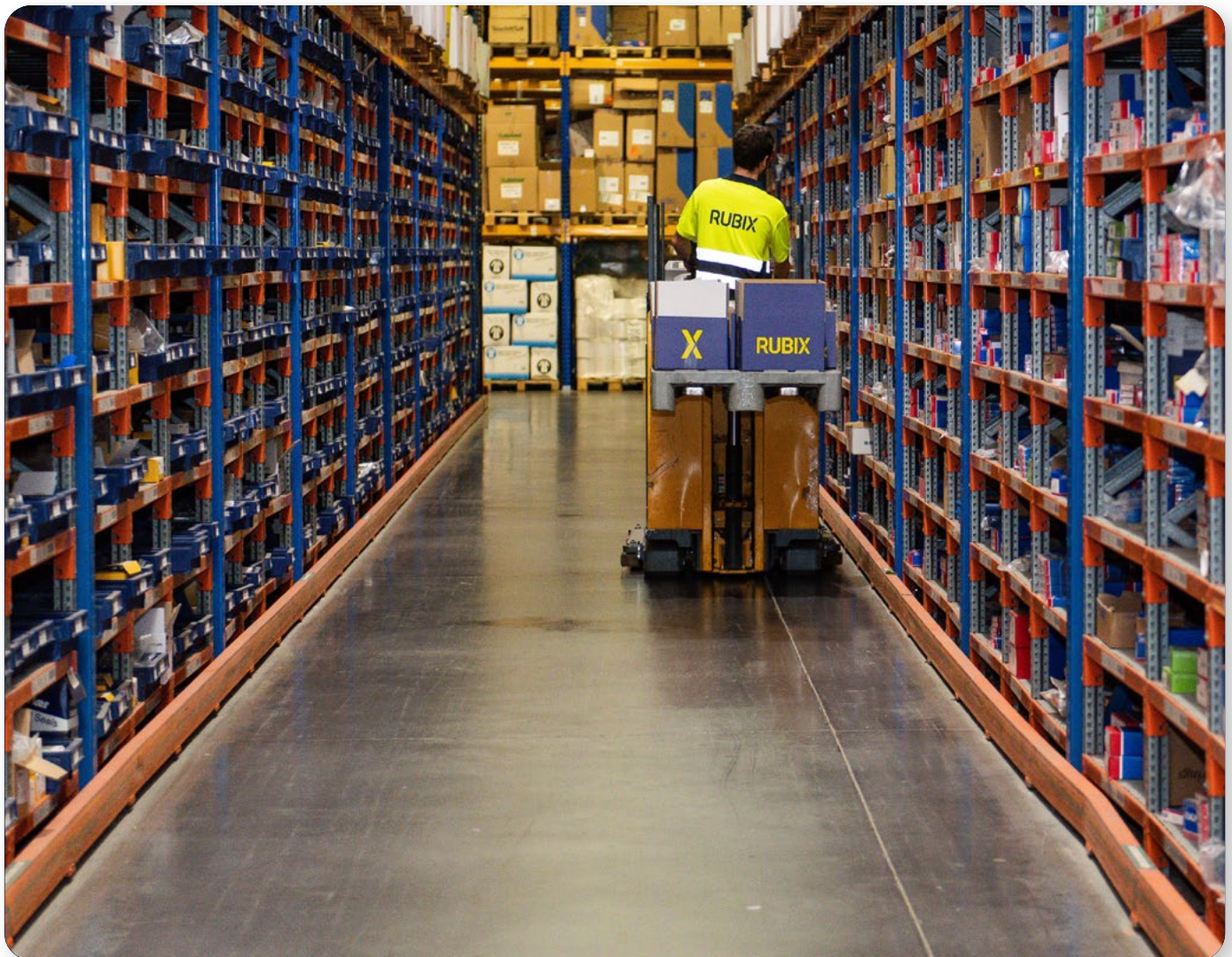


Protecting Reputations in an Unstable Supply Chain

Introduction

The supply chain once ran quietly in the background, only noticed when something went wrong. Now it has moved to the front row. Since the pandemic, leaders have seen that when the supply chain falters, everything falters. This report explores that shift. It shows resilience as a source of competitive advantage and a protector of reputation, not just an operational detail.

We look into the forces shaping supply chains today, where they hit hardest, and the steps manufacturers are taking to protect operations.



3

The Shape of Supply Chains



The Shape of Supply Chains

Not every pressure on a supply chain behaves the same way. Some have been present for so long that manufacturers have got used to them. They're factored into budgets, planning and expectations – a constant background hum that rarely surprises anyone.

Others give no warning. They arrive fast, are hard to predict, and can blindside even a well-run operation before there is time to react.

The constant anxiety

Some pressures on European supply chains never really lift. They have shaped factories for years, and manufacturers now simply plan around them.

Cost sits at the centre. Raw materials, energy and labour have risen steadily for years, and few expect a reversal.

Alongside cost sits a structural reliance on distant suppliers. Machined parts, PLC boards and semiconductors are still sourced heavily from India, Malaysia, Taiwan and China, a choice made years ago on price, which leaves supply chains long and slow.

China supplies

100%

of EU heavy rare earths,
99% of magnesium, and
79% of gallium.

(Eurostat/European Commission, 2023)



Inside the factory, the picture is familiar. Skilled technical staff are ageing towards retirement while too few younger workers enter the sector. Knowledge is concentrated in a handful of people that is steadily thinning.

Many businesses run on legacy systems. Data is often disconnected and a long-standing reluctance to overhaul fragmented supplier bases and outdated processes stands in the way of progress.

The sudden shocks

Against that baseline, a sharper set of forces is bearing down.

From Ukraine to the Middle East and rising tension across the Pacific, geopolitical instability is feeding directly into energy prices and supplier certainty, with many expecting the situation to escalate further.

53%

of procurement respondents cited geopolitical instability as the primary cause of current shortages.

(CIPS, 2025)

Eurozone suppliers' delivery times lengthened to the greatest extent in over

3½

years

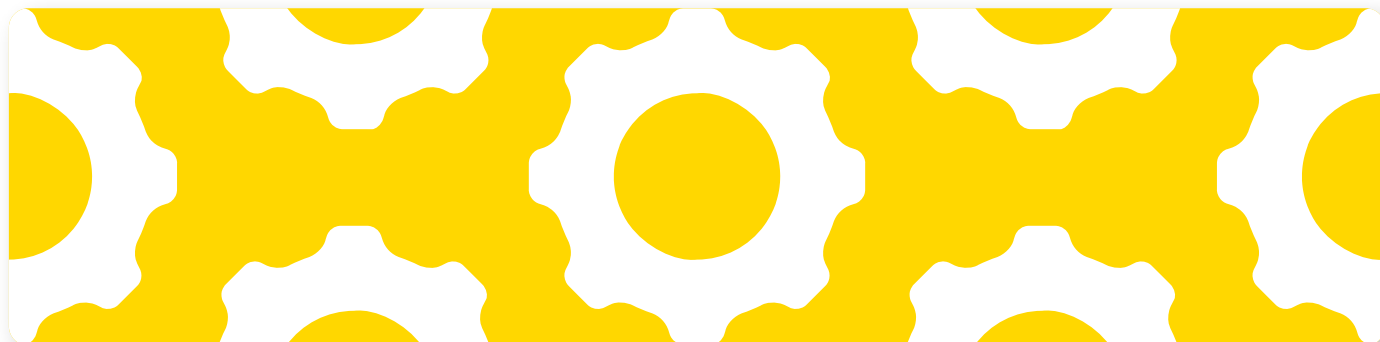
in March 2026.

(S&P, 2026)

Trade and regulation are tightening, as tariffs, import rules and a growing weight of ESG, safety and data compliance reshape how and where goods can move.

Physical routes are under strain too. Shipping and logistics networks remain disrupted, and climate-related events such as floods and storms add a further layer of unpredictability. Technology cuts both ways: semiconductor dependence, cybersecurity exposure and the pace of change all sit on the risk side of the ledger.

Unlike background pressures, these risks give little warning, and it takes only one to set the whole chain in motion.



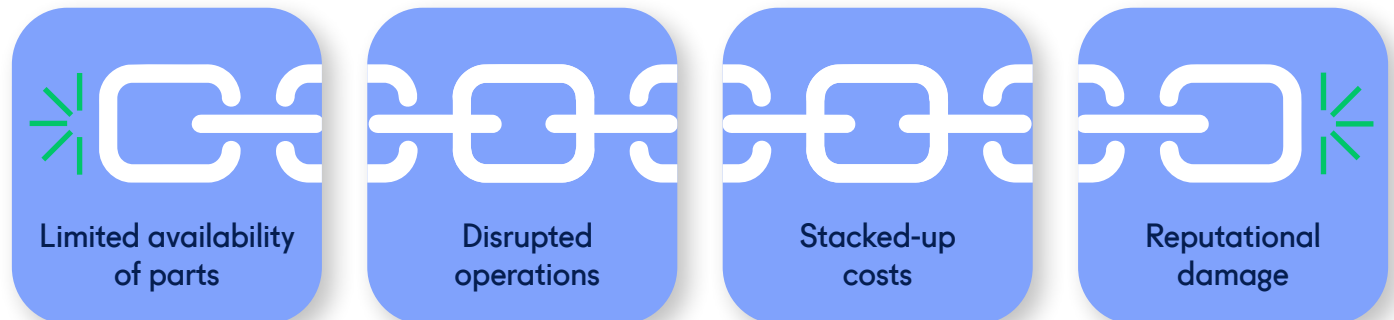
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The Chain Reaction



The Chain Reaction

It begins with a part that doesn't arrive. From there, production halts, orders back up, other parts fail, and one problem sets off the next, moving through the business until it reaches the thing a manufacturer can least afford to lose: its reputation.



It starts with the parts

The first link is availability. Ordinary off-the-shelf items now run to two or three weeks. Parts from the Far East take twice as long as they used to. And OEM control equipment that once arrived in one to three months can now take six to nine.

"About 26 weeks once, for just an off-the-shelf circuit board."

(Procurement Professional, Distilling)

Standard motors are becoming harder to find, pushing teams to reverse engineer parts and hunt down new suppliers. With competition thin in some categories, the suppliers who do hold stock know it and charge a premium.

Operations feel it next

Missing parts quickly become missing production. One distillery's annual maintenance shutdown has stretched from two or three weeks to eight, simply because ordinary parts now carry a three-week wait. While the plant is down, it is not producing.

A single missing bolt can stop an entire line. Planned maintenance slips into reactive repair, engineers hoard private "squirrel stock" that no one can see, and the risk of unplanned stoppages climbs. For plants tied to availability targets, that risk comes with hard financial penalties.





Then costs stack up

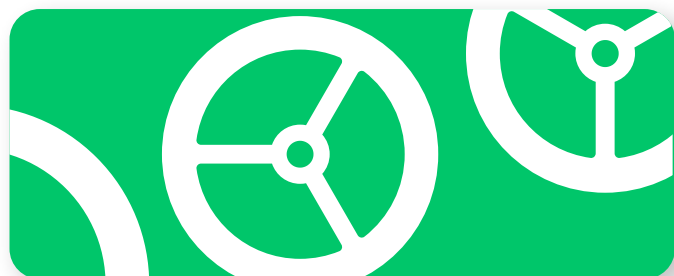
Keeping the line running carries a price, that is rising on two levels. Ordinary inflation sits underneath, with steel, energy and electrical components climbing every year and, by most accounts, never coming back down.

On top sits the premium for speed. Firms are paying 20% more to source machined parts closer to home, and far more when the need is urgent. To get parts that week rather than that month, manufacturers can see markups of 80% and beyond.

Paying double for a part you can get quickly is nothing next to the losses you avoid by delivering on time.

"It affects my margin internally to try and save the relationship, to not damage the reputation, because the reputation is more important."

(Operations Director, Automation)



And it lands on reputation

Manufacturers swallow these costs because the alternative is worse. A late part becomes a missed delivery. A missed delivery becomes a broken promise to a customer. And a broken promise, repeated, hardens into a reputation for unreliability that is far harder to win back than any margin.

The evidence is stark. One operations director paid 80% more for a single part purely to protect a relationship with a major pharmaceutical client. The stakes are rarely small. A four-week delay on critical parts pushed a project worth close to £750k to the point the customer no longer wanted it.

This is where the domino effect finally settles. Parts, downtime and cost can all be recovered. Reputation, once lost, is the hardest thing to rebuild.

Where it hits hardest

Size decides how hard the same disruption hits. Larger manufacturers and distributors buy in volume, hold deeper relationships with suppliers and can lean on wide networks to find a part when their own shelves are bare.

They can also absorb the premium, paying 80% or more for urgent delivery when money, as one put it, is close to irrelevant.

Smaller operators have none of that cushion. They can't carry large inventories, can't pay scarcity prices every time, and depend on regional suppliers who lack the reach to source a missing part.

The result is a widening gap. The same shock a large firm can buy or source its way around can leave a smaller one waiting months, and paying more when the part finally arrives.

5

Building Resilience



Building Resilience

None of these pressures can be removed, but their impact can be managed. The manufacturers protecting their reputation best have stopped waiting for supply chains to settle. Handling disruption has become part of the job itself, not an interruption to it.

"Supply chain is exactly there to make sure any interruption is managed in the best possible way. The challenges are there, but that is what supply chain management is about. It is part of the job."

(Head of Supply Chain, Chemicals)

"We produce and source as much as we can locally. It is not only resilience, it is being close to the market and the customer, and faster to react"

(Head of Supply Chain, Chemicals)

From that mindset follows five steps to shorten the distance between a problem and its fix.

1. Bring supply closer

Nearshoring shortens the line between order and delivery. One automation builder now sources machined parts from Croatia rather than Malaysia, accepting a 20% premium for parts that arrive 50% faster. The cost is real, but so is the security, and for firms committing to delivery guarantees, quicker access to parts is becoming non-negotiable.

2. Consolidate the supplier base

A sprawling supplier list feels flexible but leaves a business less resilient, not more. One distiller carries around 2,000 suppliers yet uses fewer than 1,000. It creates noise that slows everything down.

Partnering with fewer, broader-range suppliers, or a single MRO integrator, replaces that with breadth of stock, providing faster lead times through greater buying power, wider geographic reach and faster access to technical expertise when parts need replacing.

It takes time and trust to embed, but businesses who have already done it are pulling ahead.

3. Hold stock where it counts

Where a part is critical and lead times are unacceptable, manufacturers are stockholding again. A food producer keeps a deeper reserve of critical spares, engines, special chains and blades, because a breakdown in production is something the business cannot accept.

The skill is being selective, protecting the parts that could stop the line rather than carrying everything.

4. See the whole picture

Resilience depends on knowing what you have and what you need. Manufacturers are replacing spreadsheets and individual memory with integrated systems that tie inventory to assets and assets to maintenance, giving a single live view across sites. Better visibility turns guesswork into planning and catches a shortage before it becomes a stoppage.

5. Predict, don't react

The strongest position of all is knowing a part will fail before it does. Predictive maintenance and AI can forecast failures early, sometimes months ahead, and trigger an order in time. It buys the one thing every stretched supply chain lacks: time to react.

The next frontier may be collaboration rather than control. In automotive, the Catena-X consortium - originally BMW-led and now an independent company - is building a secure platform for manufacturers, suppliers and OEMs to share end-to-end supply chain data. The aim is simple: if everyone sees the same picture, everyone reacts earlier. It points to where resilience is heading, from firms defending their own patch to industries pooling visibility.



Conclusion: Keeping the promise

Supply chains will not settle any time soon. Chronic pressures are here to stay, and the acute ones will keep arriving without warning. While a manufacturer can't control disruption, it can control how far it travels once it starts. Left unchecked, a single missing part works its way through operations, into cost, and finally into reputation.

This is why the Index has risen to 79 - not because pressure eased, but because the strongest operators have accepted this, and are shortening the distance between a problem and its fix: bringing supply closer, consolidating suppliers, holding the right stock and predicting failures before they happen.

None of it removes the pressure. What it does is keep the promise a manufacturer makes to its customer, even when the supply chain does not. And that promise, kept time after time, is what a reputation is built on.