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Supply-Chain Resilience in an Era of Increased Uncertainty

Kaewkamol Karen Pitakdumrongkit
Executive Director
Pacific Economic Cooperation Council

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State of the Region Report (SOTR) 2025-2026



Theme: "Trade Policies in A Disrupted World and the Risk of Disruption"

For the full report, please scan

Uncertainty Is Increasing

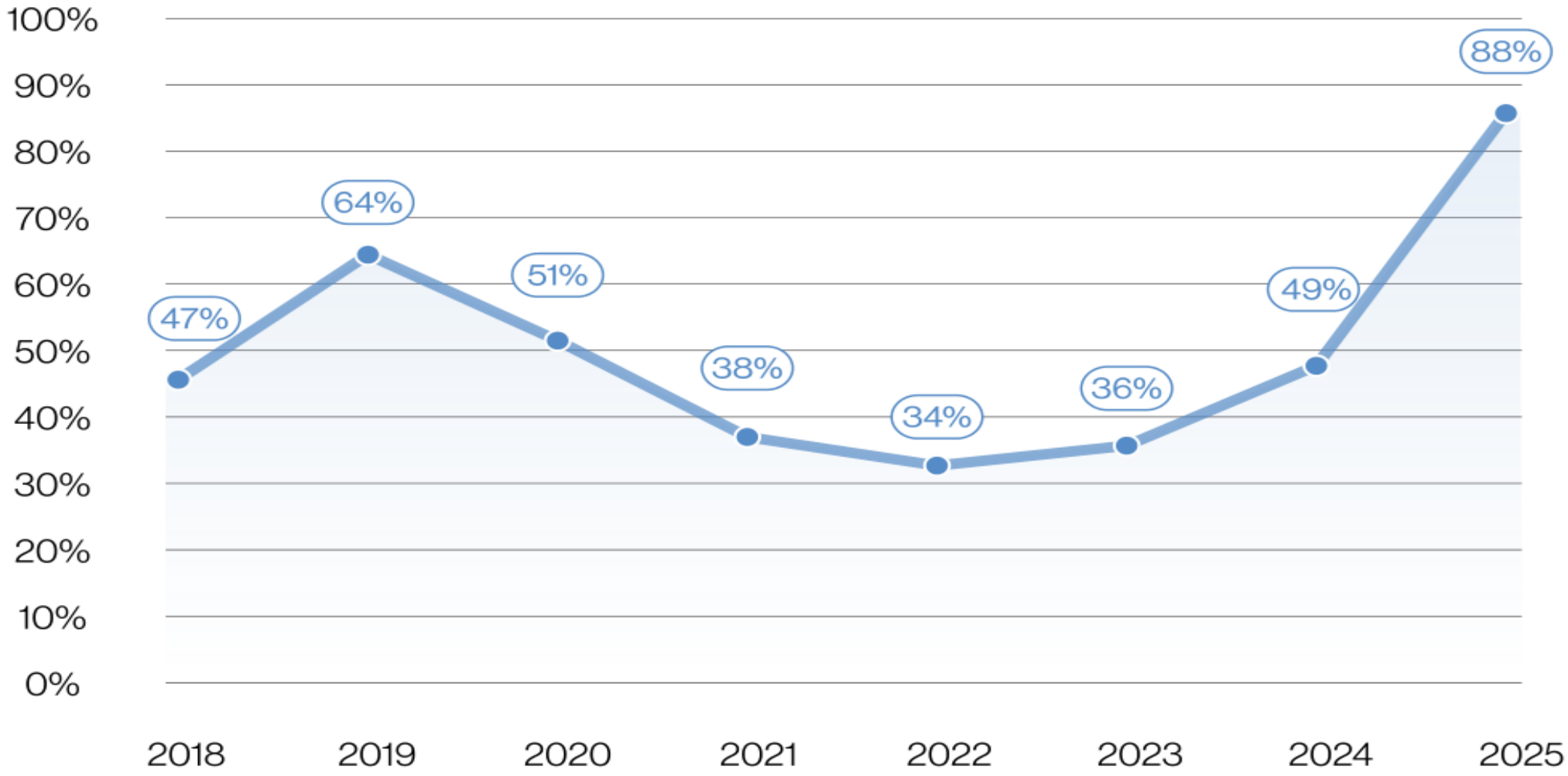
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Top 5 Risks to Growth

1. INCREASED PROTECTIONISM AND TRADE WARS
2. GLOBAL ECONOMIC SLOW DOWN
3. GLOBAL SUPPLY CHAIN DISRUPTION
4. INFLATION/ COST OF LIVING
5. CLIMATE CHANGE/ NATURAL DISASTER

Source: State of the Region Survey (2025)

Share of Respondents Choosing “Increased Protectionism and Trade Wars” as Risk to Growth



Source: State of the Region Survey (2018-2025)

How Is Uncertainty Affecting The Region's Supply Chains?

Effects of Increased Protectionism on Economy

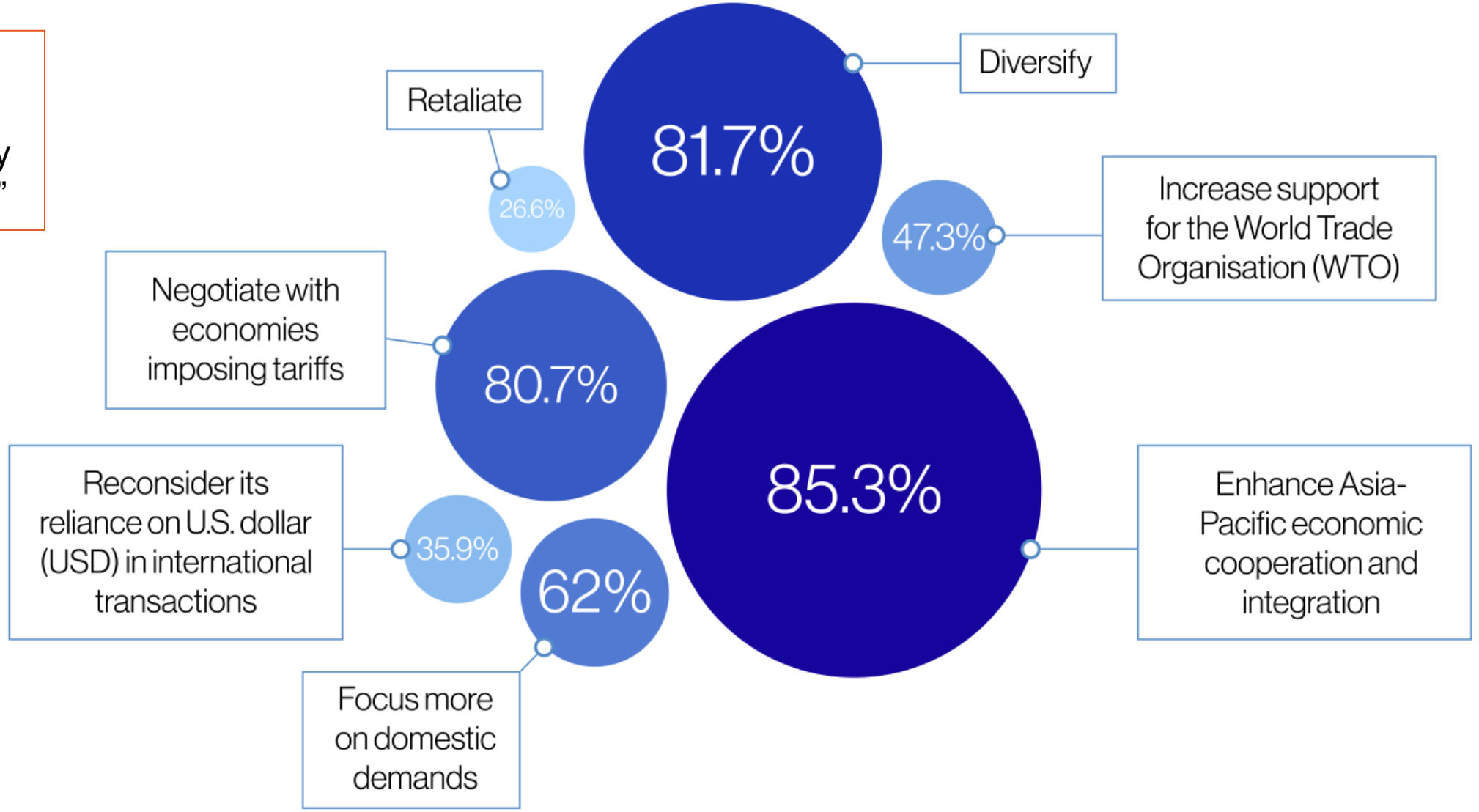


Source: State of the Region Survey (2025)

How Are Regional Economies Adapting?

Governments' Responses to Tariffs

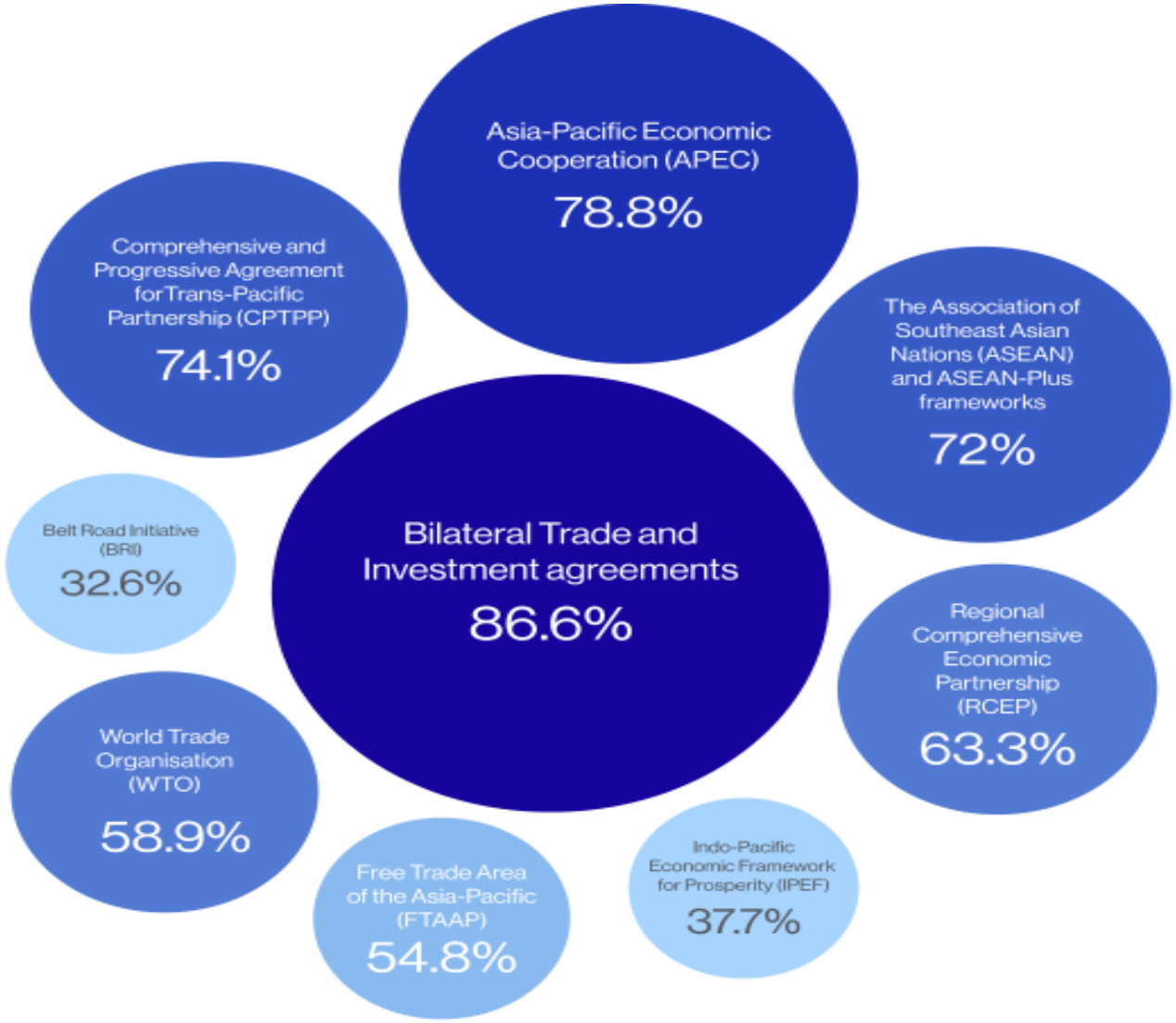
% = Share of respondents choosing as "very likely" and "likely"



Source: State of the Region Survey (2025)

Frameworks to be Promoted to Advance Regional Economic Cooperation in This Challenging Time

% = Share of respondents choosing as “very likely” and “likely”



Source: State of the Region Survey (2025)

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Going Forward, What Kind of Resilience Should Regional Economies Pursue?

What Kind of Resilience

- **Building blocks of resilience**
  1. **Diversification** for suppliers and markets
  2. **Regional Cooperation** (e.g. APEC, ASEAN, CPTPP, RCEP)
  3. **Rules-based multilateral trading system** (e.g. WTO)
  4. **Interoperability** of rules and standards
  5. **Track 2 Engagement** and **Multi-Stakeholder Dialogue**

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Thank you very much

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Top 5 Concerns on Trade and Globalization



Source: State of the Region Survey (2025)