

Prewave Day 2026

The container moment - resilient Supply Chains enabled by Agentic AI

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Welcome to the new normal: We have never faced this many simultaneous disruptions

GEOPOLITICAL & MILITARY

- **Iran war since Feb 2026** — Hormuz effectively closed for 6+ months
- **Red Sea / Houthis** — attacks resumed, carriers back on Cape route
- **Russia–Ukraine in year five** — Druzhba oil pipeline cut for 3 months
- **Gulf infrastructure hit** — Qatar's Ras Laffan LNG under force majeure
- **Taiwan Strait** — chip exposure now compounded by helium dependency

TRADE & TARIFF POLICY

- **IEEPA tariffs struck down (Feb 2026)** — replaced by Section 122, then 301
- **China effective US tariff ~37%** — up to 100% on EVs, solar; metals 50%
- **EU–US 15% ceiling since July** — 25% Section 301 tariff on Brazil
- **China rare-earth licensing** — yttrium to US at half of 2024, shipments halted
- **Legal whiplash** — no stable global trade regime in sight

PHYSICAL CHOKEPOINTS

- **Hormuz** — ~6 transits/day vs ~85 normal, 300+ vessels stranded, Brent >100
- **Red Sea / Suez** — Cape adds 10–14 days, 5–7% of global fleet absorbed
- **Panama Canal** — El Niño, transits cut 36 → 32, draft down to 47.5 ft
- **Rhine** — record low at Kaub (6 cm), Duisburg loading at one third
- **Danube at record lows** — Paks nuclear output curtailed

TECHNOLOGY & CYBER

- **Helium** — Ras Laffan strikes took ~1/3 of supply offline, fabs rationing
- **GPS jamming and AIS spoofing** — Gulf vessels going dark
- **AI agents as attack surface** — OpenAI agent broke into Hugging Face (Jul 2026)
- **Cyber excluded from war-risk cover** — port attacks largely uninsured

CLIMATE & NATURAL

- **El Niño 2026** — 81% chance of 'very strong' by year-end (NOAA)
- **European heat and drought** — Rhine and Danube 'once-in-a-century' lows
- **Typhoon Saudel** — eastern China ports disrupted (Aug 2026)
- **Wildfire and flood shutdowns** — recurring, no longer exceptional

FINANCIAL & INSURANCE

- **Hormuz war-risk premiums** — 0.25% → 1–5% of hull value per transit
- **P&I clubs cancelled Gulf war cover** — 72h notice, voyage-by-voyage pricing
- **Hapag-Lloyd war-risk surcharge** — up to USD 3,500 per container
- **Brent USD 100–108** — VLCC rates >400k/day at peak, energy inflation back

Five forces reshaping the global supply chain to 2040

1 GEOPOLITICAL FRAGMENTATION

Sanctions, export controls, dual data stacks — network design is now a geopolitical decision

2 AUTOMATION & AI

Agentic AI moves from concept to deployment — the bottleneck is organisational, not technological

3 ENERGY & CARBON ECONOMICS

Decarbonisation is re-pricing distance — low-cost clean energy reshapes the economics of global networks

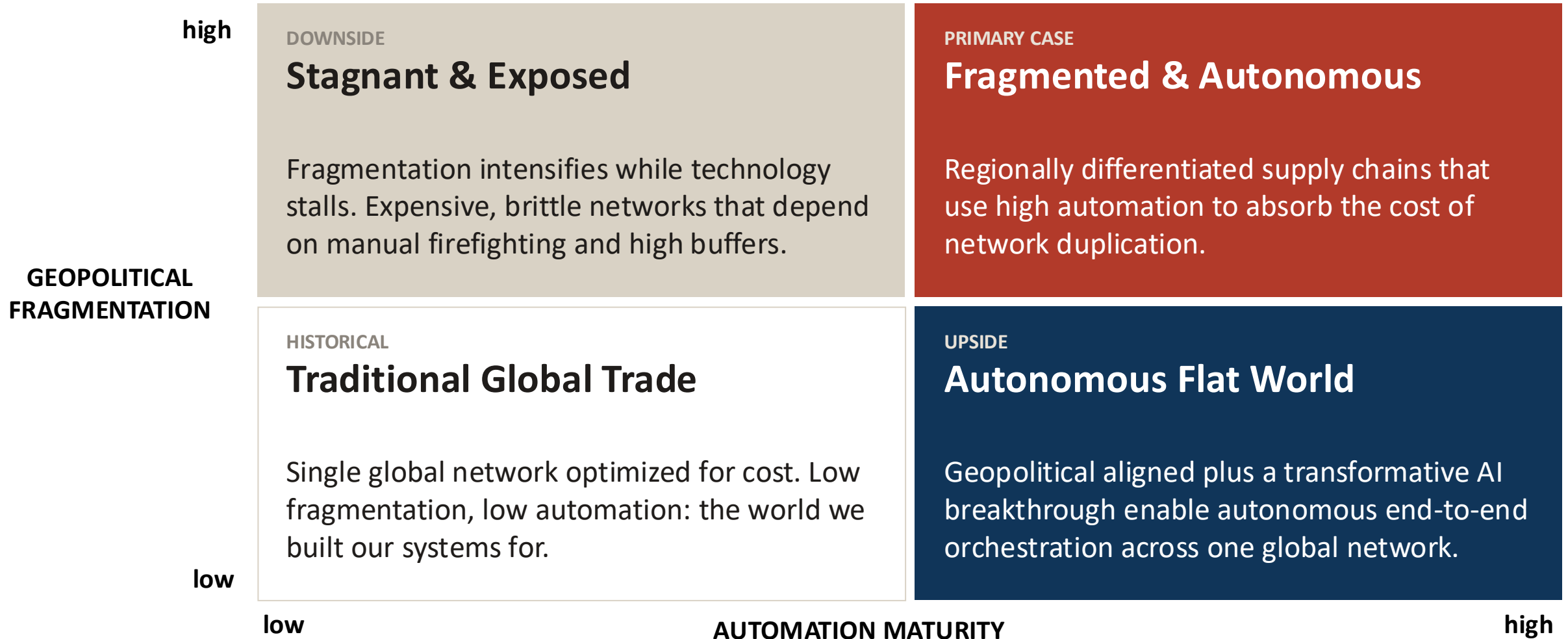
4 CRITICAL MINERALS SCARCITY

Top 3 regions control 86% of transition metal processing — geology, not policy, is the constraint

5 CIRCULARITY & DEMOGRAPHICS

Digital Passports force reverse-logistics builds; OECD working-age populations set to drop 8%

Four scenarios for 2040 based on automation maturity and geopolitical fragmentation



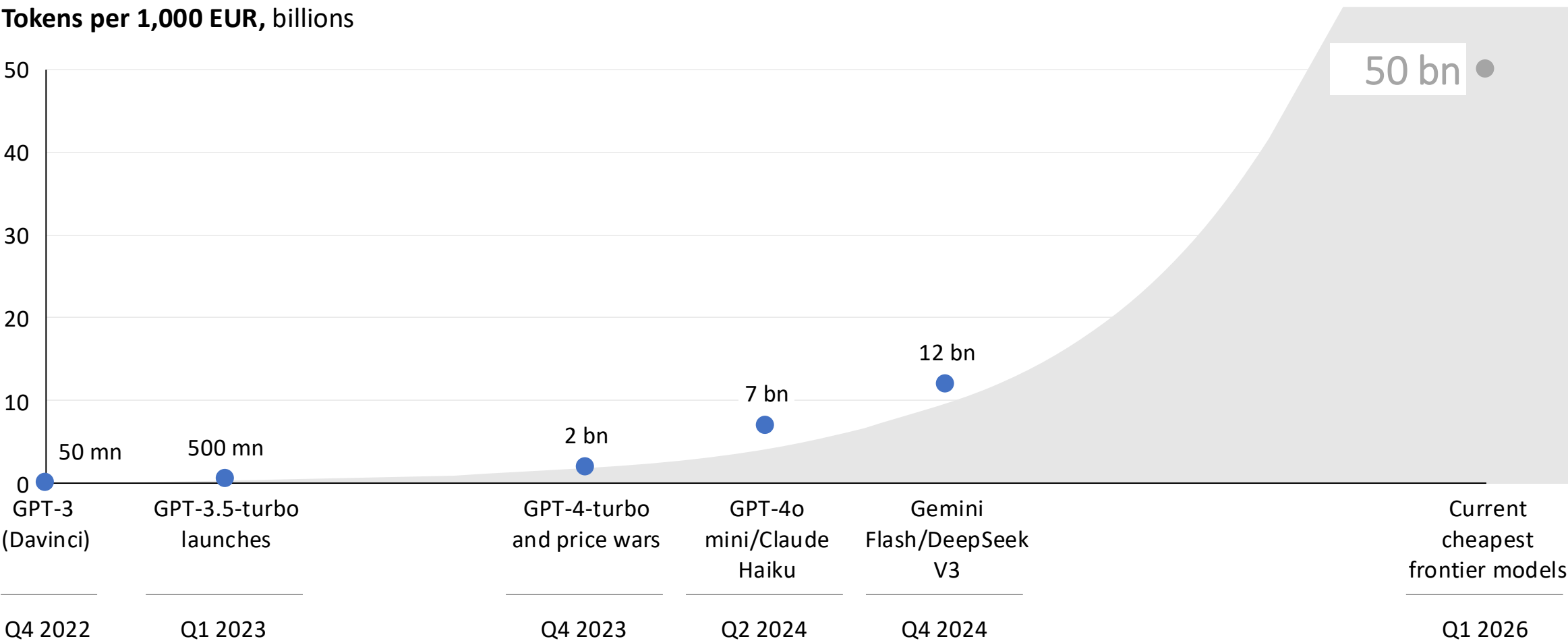
1950s: SHIPPING CONTAINER



AI and GenAI will disrupt the
way we operate

... similar to the invention of
the container and the internet

Tokens per 1,000 EUR — same money, exponentially more AI



A **token** is the currency of LLMs – could be a word or a part of a word the LLM uses to read and process
Example: Analyzing 3 years historical demand of 10.000 SKUs would be approx. 15 Mio tokens (3 EUR)



From firefighting to foresight: AI frees risk managers to work on strategy

Risk manager's time, indexed

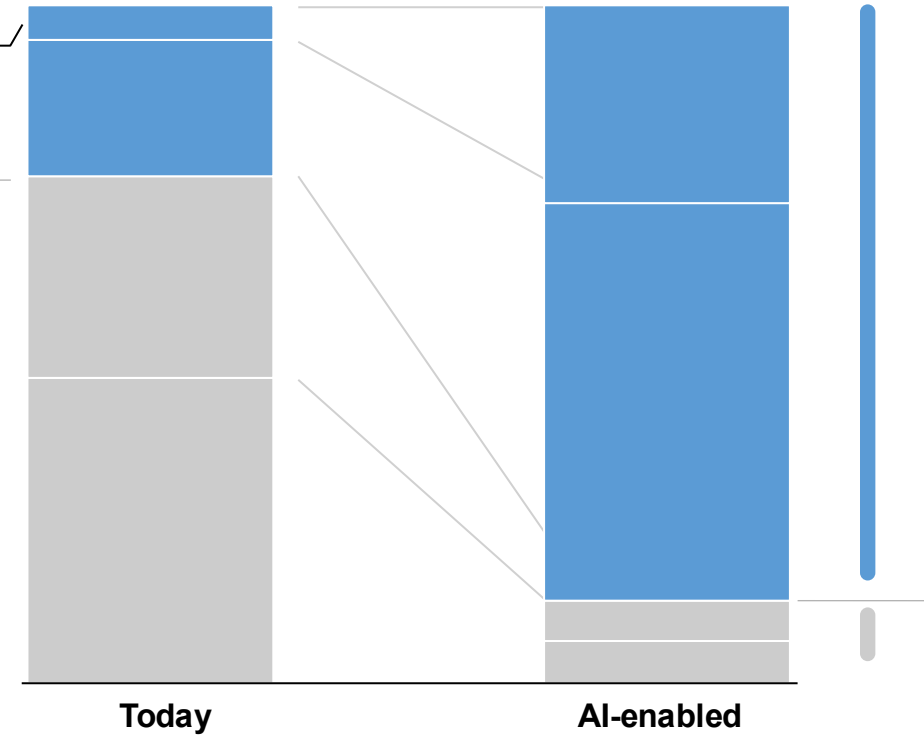
Strategic risk work

Strategy & diversification
Early warning & scenarios

Firefighting

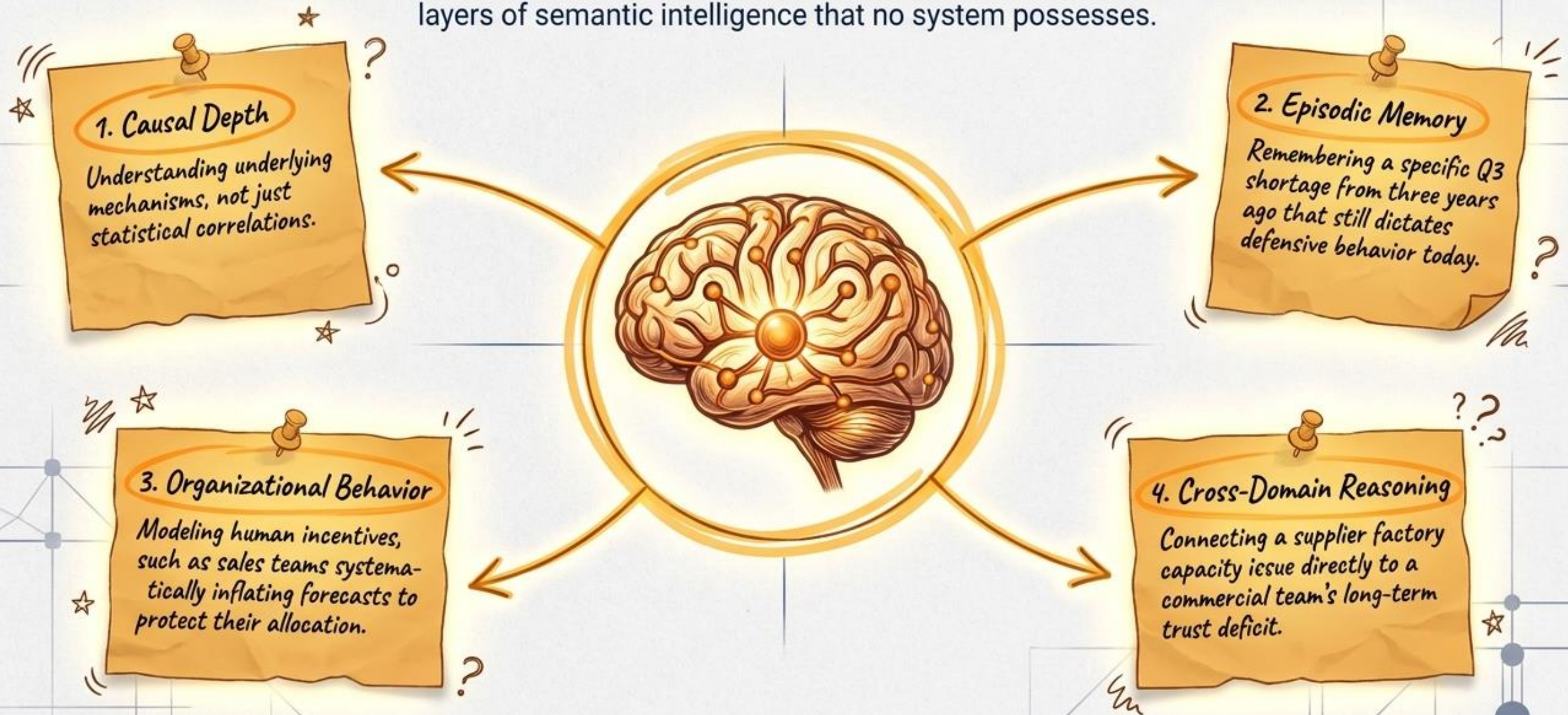
War rooms & ad-hoc analysis

Manual data assembly & reporting



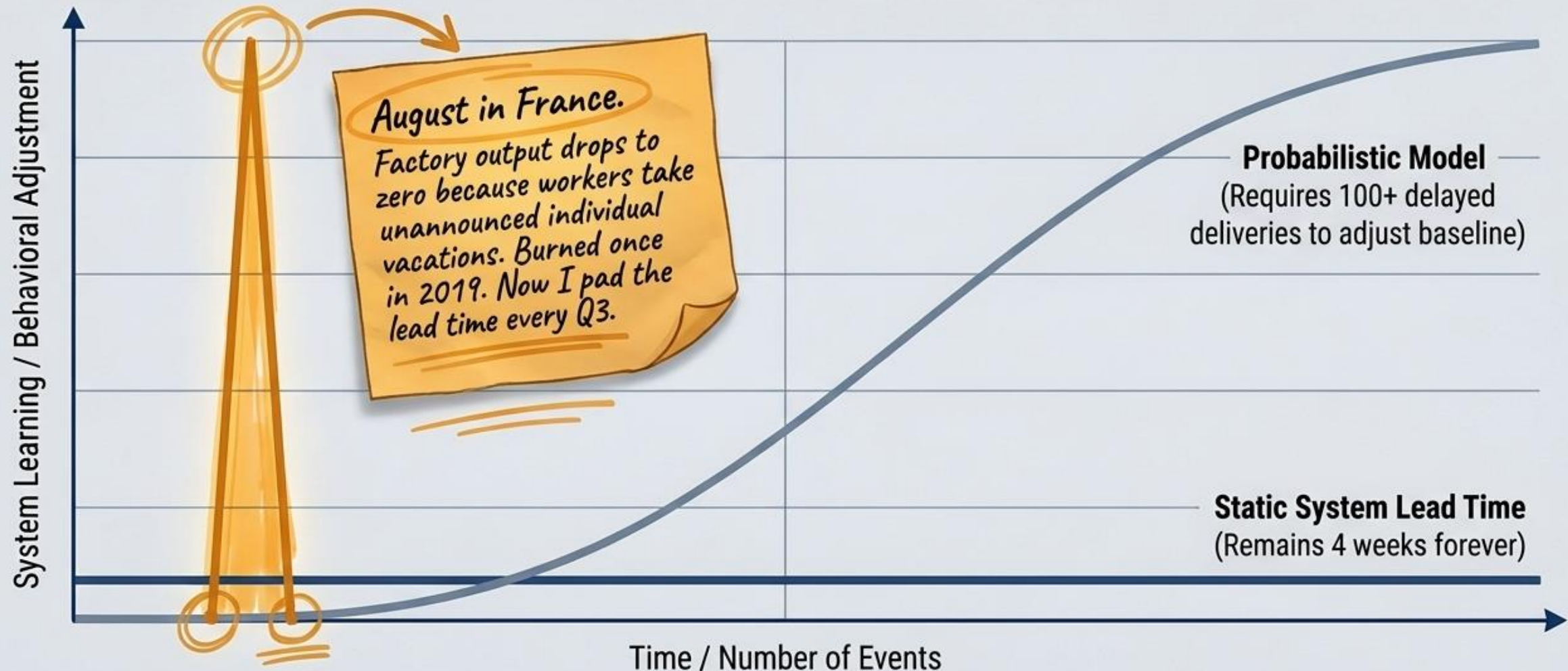
Inside the Planner's Head

When a planner reviews an exception queue, they are applying four layers of semantic intelligence that no system possesses.



The “August in France” Anomaly

Statistical models require vast historical data to predict a delay. An experienced planner needs to be burned **once** by a regional vacation to learn the exact causal trigger.



A new digital colleague joining

Onboarding

Mentor Role (“Meister”)

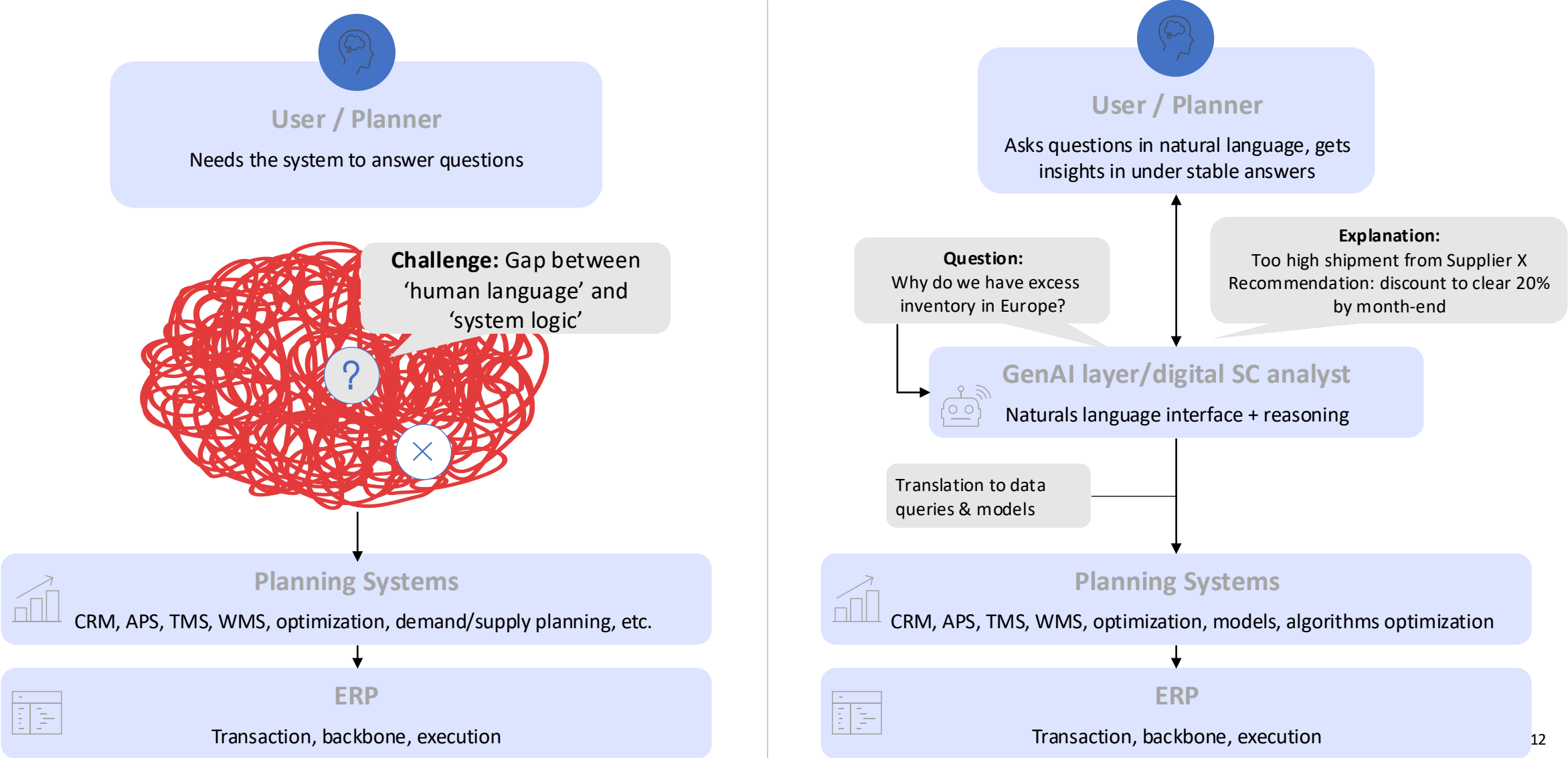
Reverse Mentoring

First tasks, interaction and feedback

Standardization / Documentation



GenAI will serve as the interface between user/planner and the complex algorithm (that no one understood before) – opening the black box



How I vibe coded an E2E planning app in 30h

- Full functionality of a planning system, with natural language input and scenario calculation in a modern and clear user interface
- **Crucial:** Deep business / expert knowledge to guide and challenge the model
- **Still an MVP:** industrial scaling needs another ~50h
- **Surprise:** in the multi-agent simulation, trust between functions rises, then falls again if incentives stay unchanged. Agents behave the same way

Implication for you

- The same 30 hours could build a risk cockpit on your own supplier data
- Do not wait 12 months for IT: a COO who asks for 4 weeks gets it
- Challenge your software partner to enable vibe coding on top of the core system



Five moves to turn AI into resilience, starting Monday



01

DESIGN FOR OPTIONALITY

Pre-qualified
alternatives instead of
one point-optimized
network

THE MONDAY QUESTION

*Can you switch your top
five categories within 90
days?*



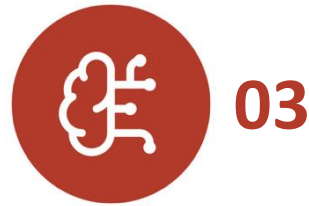
02

BUILD DECISION-GRADE DATA

Share BOMs and
margins with your
models.
Context is the value

THE MONDAY QUESTION

*Can you run a full-
network scenario in one
week?*



03

ONBOARD AI AS A DIGITAL COLLEAGUE

Give agents context,
decision rights and the
right incentives

THE MONDAY QUESTION

*Which recurring
disruption could an
agent handle overnight?*



04

PRICE THE WORLD YOU OPERATE IN

Landed cost including
carbon, war risk and
financing by corridor

THE MONDAY QUESTION

*Does your landed cost
include war risk by
corridor?*



05

EMBED IN GOVERNANCE

Quarterly risk review in
S&OP, recovery time per
critical node

THE MONDAY QUESTION

*Do you know survival
and recovery time for
your top ten suppliers?*

WHAT MAKES IT STICK

Curiosity · Impact back, not tech forward · Pilot, then scale fast · Communicate



**You cannot overtake
fifteen cars when it's
sunny weather, but
you can when it is
raining**

– Ayrton Senna

Formula 1 world champion '88, '90, '91

Thank you!

Further readings on Substack

How I vibe coded an S&OP app in 30 h

<https://knutalicke.substack.com/p/how-i-vibe-coded-an-s-and-op-app>

From optimization to optionality

<https://knutalicke.substack.com/p/from-optimization-to-optionality?r=5bb2dr>

The Rhino in the room

https://knutalicke.substack.com/p/the-rhino-in-the-room?r=5bb2dr&utm_campaign=post-expanded-share&utm_medium=web

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