CSG Critical Supply Group©

Daily life depends on critical supply chains

UK Supply Report 2026

Helping build a clearer picture of the UK's critical supply chains

Acknowledgements

Delivered in collaboration with industry partners.

The UK Supply Survey & Report 2026 are delivered by MAP UK & International (MAP). MAP manages the Critical Supply Group (CSG).

The report presents findings and recommendations based on a survey that received 194 responses from UK companies supplying or capable of supplying critical sectors in the UK. It endeavours to help build a clearer picture of UK supply chains, including sovereign capability, and how businesses support the UK's 13 Critical National Infrastructure (CNI) sectors.

Engagement was supported by Made in Britain, ADS Group, All-Party Parliamentary Manufacturing Group & Policy Connect, Association of British HealthTech Industries, Chartered Institute of Procurement & Supply (CIPS), Confederation of British Industry (CBI), Energy UK, Federation of Small Businesses (FSB), Logistics UK, Make UK, National Preparedness Commission, techUK, and UK Regulators Network.

July 2026

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1. Foreword

Critical supply chains underpin daily life and national security: the energy in our homes, the water from our taps, the medicines in our pharmacies, the food in our shops, and the transport, communications and defence capabilities on which we depend. Most of the time they are taken for granted. When they do not function, however, the effects are felt quickly. Critical National Infrastructure is only as resilient as the supply chains beneath it.

Recent years have brought these issues into sharper focus. War in Europe, wider geopolitical instability, energy shocks and disruption to global trade have prompted governments and businesses to look more closely at where essential goods and services come from, and how secure that supply is. Supply chain resilience is now recognised not simply as a commercial issue, but as one of economic security, national resilience and readiness.

The UK Supply Survey & Report offers a perspective from companies that supply the UK's critical sectors. It identifies underutilised capability across the UK manufacturing and wider supply base, suggesting opportunities to strengthen UK sovereign capability through better visibility, engagement and procurement. Findings also highlight that resilient supply chains depend on both strong domestic capability and trusted international partnerships.

The recommendations that follow are intended to inform future policy and action by government, public operators, strategic suppliers, tier 1 contractors, major buyers and SMEs. They complement the Department for Business & Trade's establishment of the Supply Chain Centre, the implementation of the Procurement Act 2023 and wider government initiatives to strengthen UK supply chain resilience and readiness. They also build on the work undertaken by MAP, the Critical Supply Group and our partners through practical collaboration, evidence and engagement. The opportunity is not only to strengthen resilience, but also to support growth, investment, exports, environmental and social value, and long-term competitiveness of UK industry.

George Middleton, CSG Co-Chair and Director of MAP UK & International, chairing a CSG Roundtable, November 2025

Thank you to my team at MAP, including Professor Aristides Matopoulos and Professor Edward Sweeney, for their work on the Supply Survey & Report, and to each of the collaborator organisations listed in the acknowledgements, particularly Made in Britain, for their support.

The Critical Supply Group welcomes engagement from businesses, government, academia and other organisations interested in contributing to this work, in the UK and internationally. For collaboration opportunities or enquiries relating to the UK Supply Survey & Report, the Critical Supply Group or related initiatives, please make contact via info@mapukinternational.com.

George Middleton
Co-Chair, Critical Supply Group
Director, MAP UK & International

2. Headline Findings and Recommendations

UK companies are underutilised, indicating opportunities to strengthen domestic supply and sovereign capability -

More than 7 in 10 companies already supplying a critical sector say they could supply at least one more, with defence, civil nuclear and space the most cited sectors.

Energy is the largest shared infrastructure dependency -

40% name energy as the CNI sector they most depend on to operate, ahead of transport (29%) and communications (19%).

Resilience action is concentrated in two approaches -

50% are diversifying and contingency planning, and 49% are forming strategic partnerships. 15% are onshoring or near-shoring of production, services or hosting.

SMEs report the greatest visibility, engagement and resilience gaps -

SMEs are more likely to report poor visibility of opportunities to supply critical sectors, limited buyer engagement and no formal source of resilience information. They are also less likely to have documented their critical inputs.

Procurement processes are the biggest barriers for UK companies supplying critical sectors -

67% cite procurement and tendering complexity, and 64% limited visibility of opportunities, as the two largest barriers to supplying more into critical sectors.

Access to critical inputs is stable for most, but becoming more constrained -

Where access to critical inputs has changed, it has tightened rather than eased by nearly four to one. 33% have documented the critical inputs they depend on.

Government is the most-used source of resilience information, but many are not engaged -

49% turn to GOV.UK to inform resilience decisions, more than twice any other source, however 34% report having no clear point of reference.

Europe is the UK's most trusted supply partner -

77% consider Europe as offering the most secure and reliable supply, ahead of the United States (34%) and China and Hong Kong (22%).

Headline recommendations for government, public operators, strategic suppliers, tier 1 contractors and other major buyers in the UK:

1. Clearer governance, coordination and strategic direction:

- **Cross-government Ministerial ownership –** Establish clear Ministerial accountability, led by the Department for Business & Trade and Cabinet Office as key cross-government departments for UK supply chains and national resilience and readiness, including structured and recurring public–private engagement aligned to national resilience priorities. Convening platforms such as the Critical Supply Group can support this coordination.

2. Further leverage procurement reform to reward resilience and capability:

- **Strategic procurement –** Embed supply chain resilience, domestic capability and long-term supply security as recognised value criteria within public procurement decisions, aligned to the National Security Strategy and UK Government Resilience Action Plan. Also, including clearer resilience criteria and reporting expectations for major contractors and CNI operators.

3. Connect more UK capability to commercial opportunity:

- **Forward procurement visibility -** Standardise and improve publication of forward procurement pipelines across critical sectors to increase predictability, enable earlier supplier engagement and support investment planning.
- **Deepening existing supply -** Establish sector-led supplier development programmes, supported by relevant government departments, sector regulators and business representative organisations, to enable UK companies already supplying critical sectors to scale their participation through targeted procurement pipelines, capability mapping and structured buyer engagement. Also support within delivery attached to the UK Government's Industrial Strategy and Plan for Small and Mid-Sized Businesses.

4. Enable resilient companies and secure critical inputs:

- **SME risk mitigation -** Recognise that while SMEs are essential to resilient supply chains, smaller firms may face proportionately higher exposure to operational and financial shocks. Develop proportionate risk-sharing and support mechanisms - including phased contracting, framework access, and resilience-linked insurance and incentives - to enable SME participation without transferring excessive risk.
- **Access to critical inputs -** Support or incentivise companies to identify and secure their most critical inputs, such as through supply chain diagnostics, critical input assessments, access to new suppliers, collaborative procurement and delivery of relevant government strategies, aligned to the UK Government's Supply Chain Centre's work.[4]

5. Building a shared evidence and intelligence base:

- **Import dependency analysis -** Continue to improve understanding and prioritisation of the UK's import dependencies, including origin, concentration and substitution options, to inform strategic procurement, trade policy and resilience planning.
- **Data and AI -** Accelerate the use of shared data, artificial intelligence and other emerging technologies to strengthen supply chain mapping, supplier identification, vulnerability assessment and predictive resilience. The Critical Supply Group is available to contribute complementary business insight and data, alongside system-level analysis such as via the Supply Chain Centre, the Government Office for Science[5] and other relevant initiatives.

Recommendations for SME suppliers:

The survey findings also point to practical actions SMEs supplying critical sectors can take directly, including:

- **Use available government guidance and tools –** Make use of the resilience, preparedness, economic security and supply chain guidance available through GOV.UK and associated government functions.
- **Undertake a supply chain diagnostic –** Identify and assess the most critical inputs and the points at which they are most exposed, as a basis for prioritising action. Practical guidance and diagnostic resources are available through the Critical Supply Group.
- **Make use of business representative organisations –** Draw on, and ask more of, the business representative organisations, such as trade associations and Chambers of Commerce, on supplier visibility, buyer engagement and resilience support.

Recommendation for all:

- **Do not wait for a crisis –** Action is typically more effective and less costly before disruption than during it. The risks to critical supply chains are clear, and the case for acting early is stronger than the case for waiting.

These headline recommendations are intended to highlight the principal actions emerging from the survey. A fuller set of recommendations, is provided later in this report. (Page 21)

For collaboration opportunities or enquiries relating to the UK Supply Survey, the Critical Supply Group or related initiatives, please contact info@mapukinternational.com.

[4] https://www.gov.uk/government/publications/supply-chain-centre-mission-statement-and-action-plan
[5] https://www.gov.uk/government/publications/global-supply-chains-a-foresight-report-on-risk-and-resilience/global-supply-chains-a-foresight-report-on-risk-and-resilience#acknowledgements

3. Introduction

This UK Supply Report 2026 presents the findings of the UK Supply Survey, conducted through the Critical Supply Group (CSG).

The survey explored how UK companies supplying critical sectors view supply chain resilience and readiness. It examines the sectors companies currently supply, where they believe they could supply additional critical sectors, the barriers they face, their critical inputs and dependencies, the sources of information they rely upon, and the actions they are taking to strengthen resilience.

The findings highlight significant underutilised capability among UK companies supplying critical sectors, suggesting opportunities to strengthen UK sovereign capability through better visibility, engagement and procurement. They also identify persistent market access barriers, the central role of energy as a shared operational dependency, and opportunities to strengthen resilience and readiness across the supply base, particularly among SMEs.

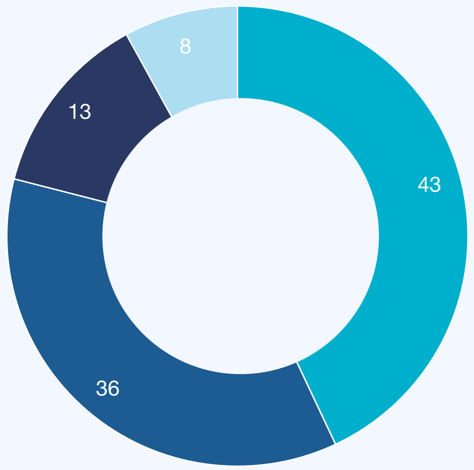
The report begins with key findings and recommendations before examining each in more detail. A respondent profile, method overview and definitions are also provided in this report.

4. Respondent Profile

The UK Supply Survey 2026 received 194 responses. Following screening, a core of 162 responses were included within scope for detailed analysis. There was a diversity of company sizes with a concentration among micro and small businesses. The majority of participating companies were involved in manufacturing goods to some degree (92%).

Respondents were located across the UK, with the largest concentrations in London and the South East. Companies reported supplying a broad range of critical sectors, most commonly health, defence, transport and energy. Most companies supplied more than one critical sector.

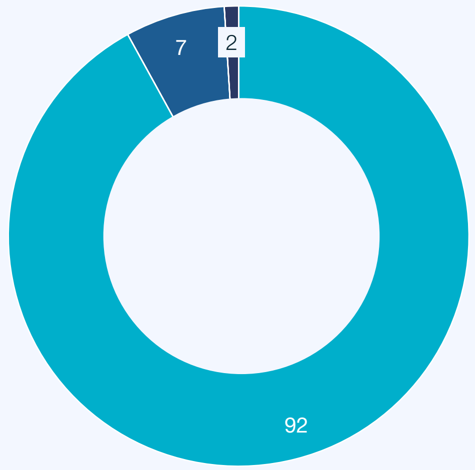
Figure 1: **Respondents by company size**



Micro - **43%**
Small - **36%**
Medium - **13%**
Large - **8%**

- Source: Company turnover band.
- Base: 194 responses.

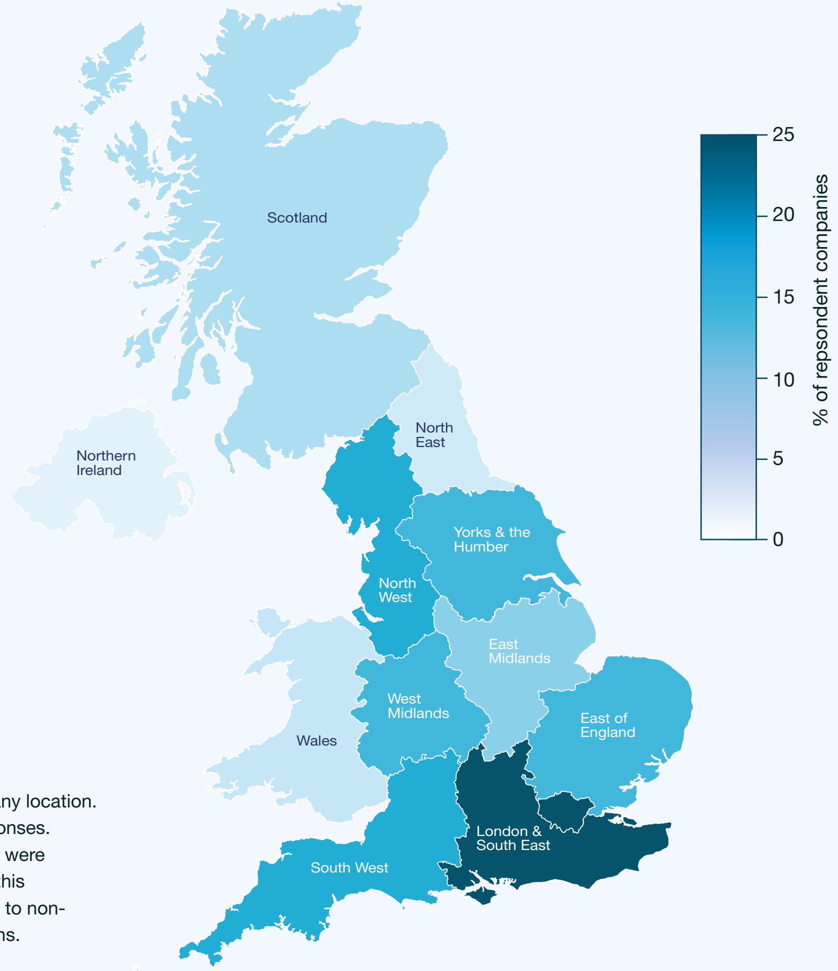
Figure 2: **Respondents by manufacturing status**



Manufactures in the UK (exclusively or with other countries) - **92%**
Not involved with manufacturing - **7%**
Manufactures outside UK only - **1%**

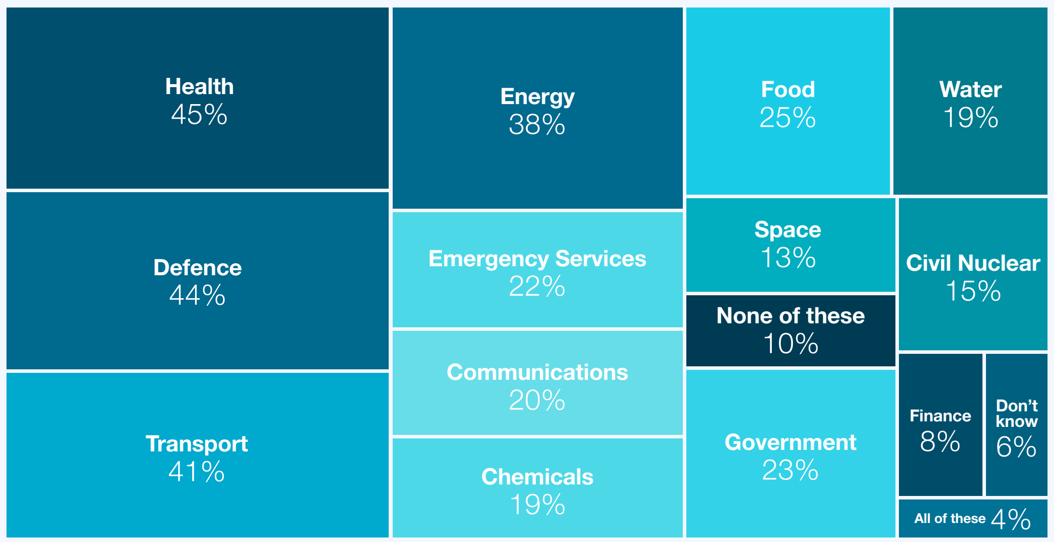
- Source: Company manufacturing status.
- Base: 194 responses.

Figure 3: **Respondents by primary UK operating location**



- Source: Company location.
- Base: 190 responses.
- Four responses were excluded from this breakdown due to non-specific locations.

Figure 4: **Critical sectors currently supplied**



- Source: Q1. Which critical infrastructure sectors does your company currently supply in the UK?
- Base: 162 responses.
- Respondents could select all that apply, so percentages do not sum to 100.

5. Method Overview

The UK Supply Survey 2026 was a voluntary survey of UK companies supplying critical sectors, designed and delivered through the Critical Supply Group (CSG). The survey was hosted on the CSG website and ran between April and May 2026. Distribution was supported by the CSG collaborator network listed in the acknowledgements.

Not every company answered every question, so the base varies by question and is shown with each figure.

The findings should be read as the views and self-assessments of the companies that took part. They are not intended to represent the UK economy as a whole or any individual sector.

Definitions of key terms used throughout the report are provided at the end.

6. Detailed Findings

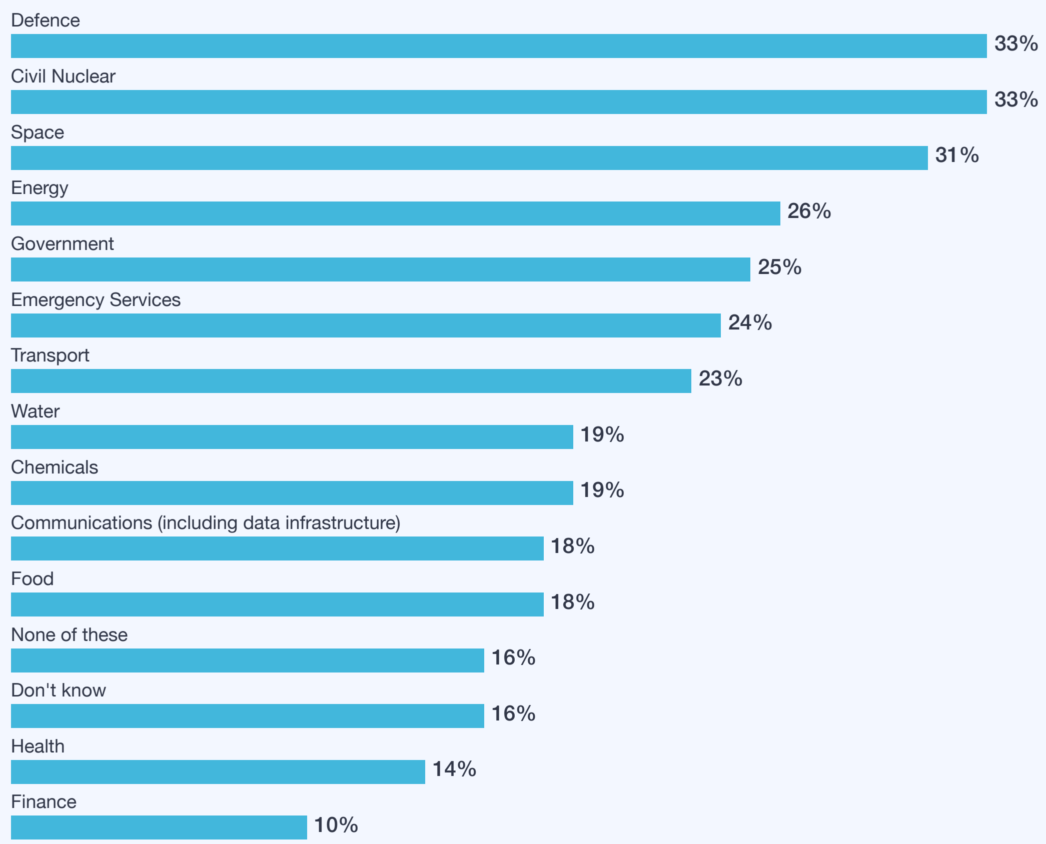
6.1 Underutilised UK supply capability and capacity

Significant underutilised capability and capacity appears to exist among UK companies supplying critical sectors.

More than seven in ten current suppliers (74%) identified at least one additional critical sector they could supply but do not currently. This was less common among large companies (64%) than smaller ones. Defence (33%), civil nuclear (33%) and space (31%) were the most commonly cited.

These findings indicate there is scope to strengthen UK sovereign capability by making better use of the capability and adaptive capacity that already exists within the UK supply base.

Figure 5: **Additional critical sectors companies believe they could supply**



- Source: Q2. Which, if any, of the following sectors does your company have the capability to supply but does NOT currently supply?
- Base: 162 responses.
- Respondents could select all that apply, so percentages do not sum to 100.

6.2 Barriers to supplying more: Procurement and visibility

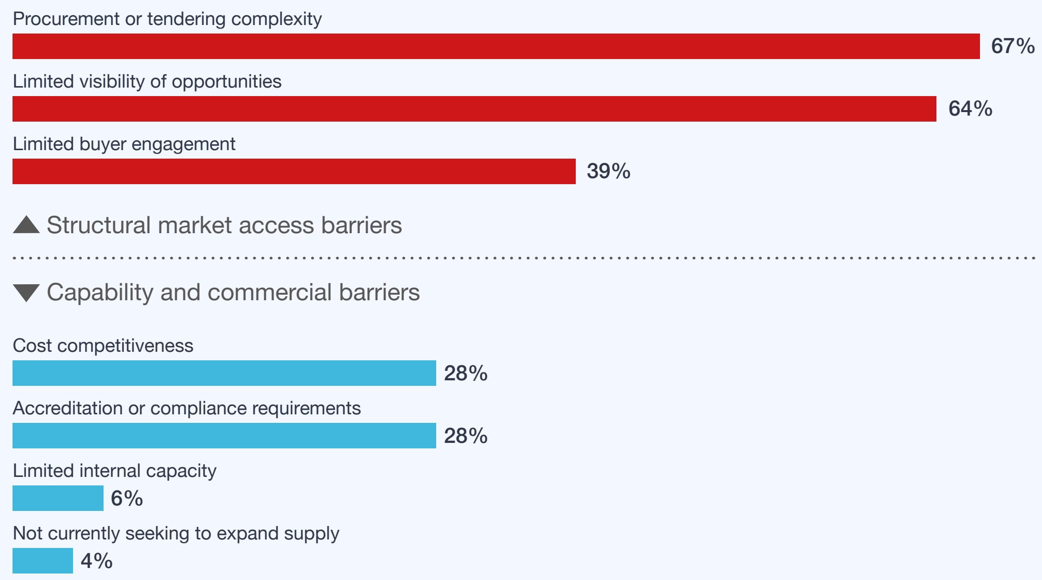
Procurement processes, not capability, are the main constraint on companies supplying more into critical sectors.

Procurement and tendering complexity were the most cited barriers (67%), followed by limited visibility of opportunities (64%) and limited buyer engagement (39%). By contrast, only 8% cited limited internal capacity. More than nine in ten companies (91%) identified at least one access barrier. These barriers were reported most acutely by SMEs, particularly around visibility of opportunities and buyer engagement.

The barriers fall into two main groups: i) Structural market access barriers – relating to procurement and access to opportunities; and, ii) Capability and commercial barriers – relating to a company's own position. The structural barriers are more prevalent.

Companies supplying heavily regulated sectors, such as defence and civil nuclear, are subject to additional controls including security clearance, export controls and sector-specific accreditation requirements. These controls also influence how procurement and compliance burdens are experienced.

Figure 6: **Barriers to supplying more into critical sectors**



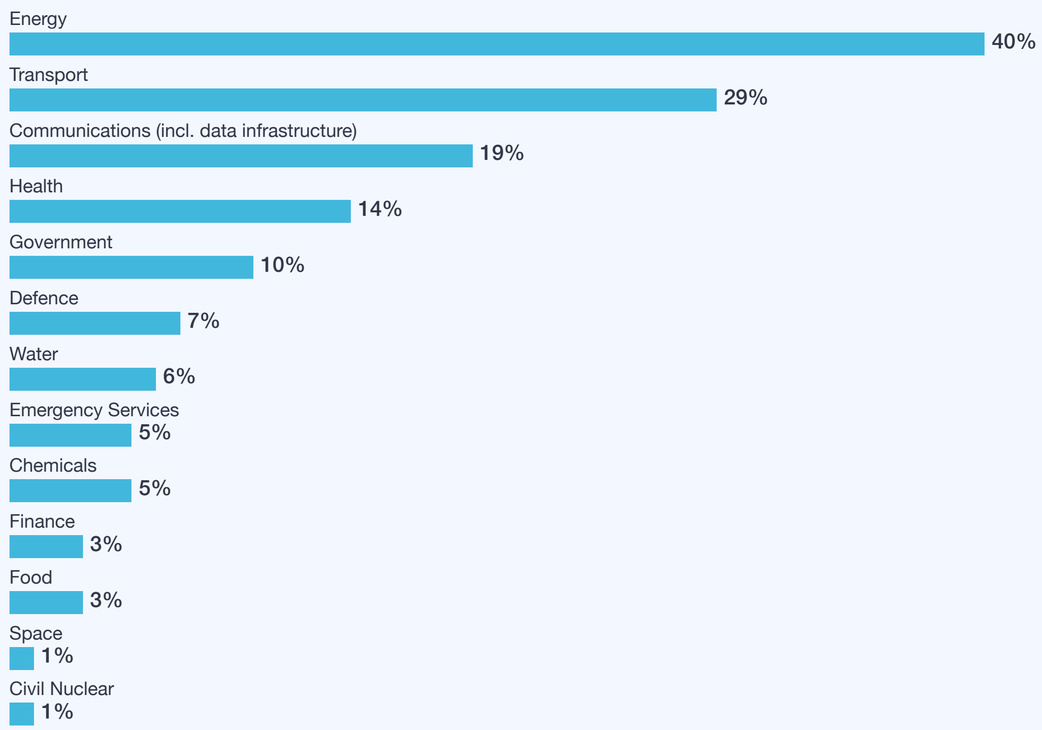
- Source: Q3. What are the most significant barriers to your company supplying more into CNI sectors?
- Base: 162 responses.
- Respondents could select up to three, so percentages do not sum to 100

6.3 Operational dependencies and the central role of energy

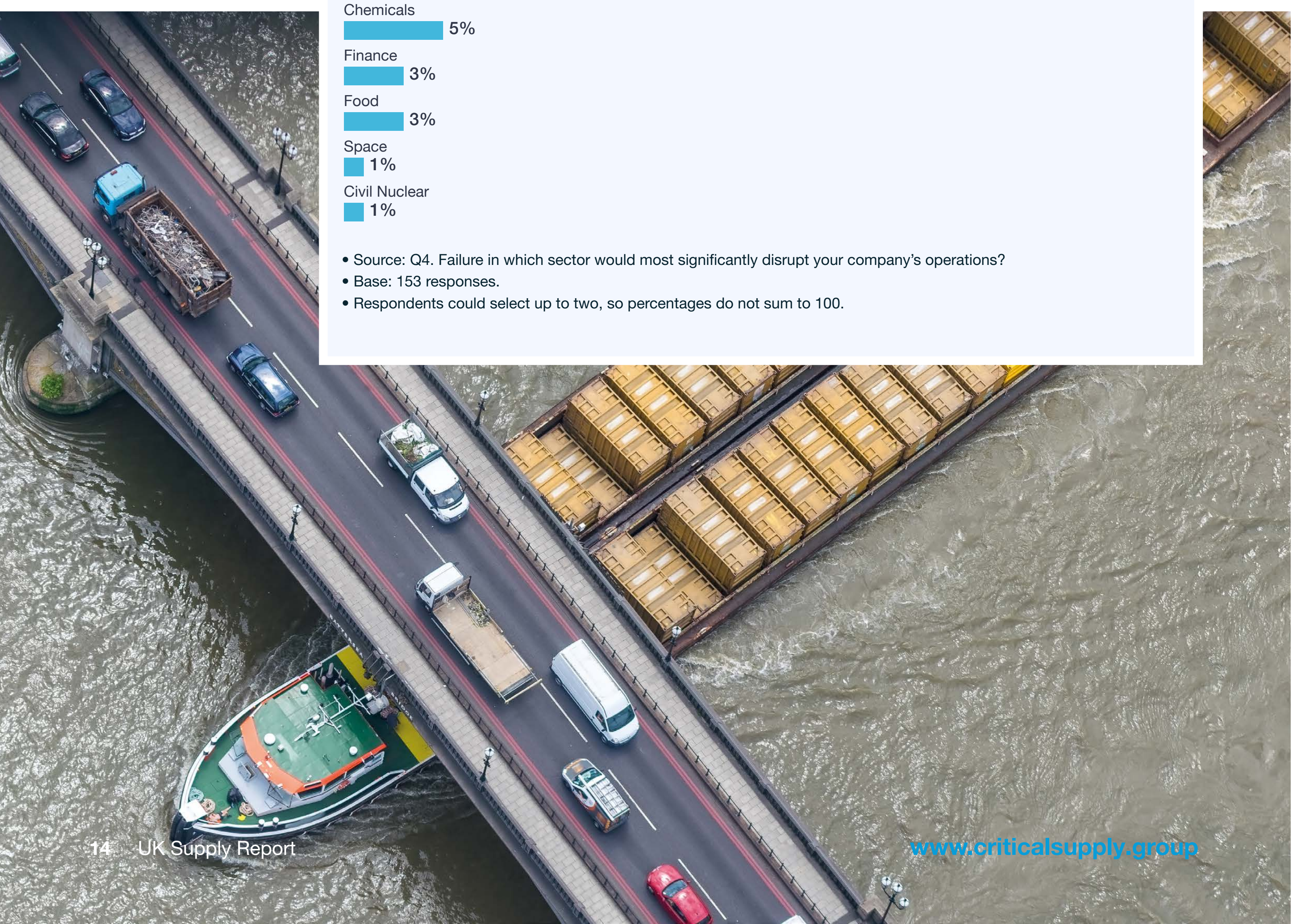
More than four in ten companies (40%) cited energy as their most significant operational dependency, well ahead of transport (29%) and communications, including data infrastructure (19%).

The findings reinforce the importance of treating energy as a cross-cutting critical supply chain dependency, with implications for resilience, competitiveness, long-term investment and national security.

Figure 7: **Critical sector dependencies**



- Source: Q4. Failure in which sector would most significantly disrupt your company's operations?
- Base: 153 responses.
- Respondents could select up to two, so percentages do not sum to 100.



6.4 Critical inputs: Identification and access

Access to critical inputs is stable for most companies, though where it is changing it is becoming more constrained. Formal documentation of critical inputs remains comparatively limited.

How access to critical inputs has changed:

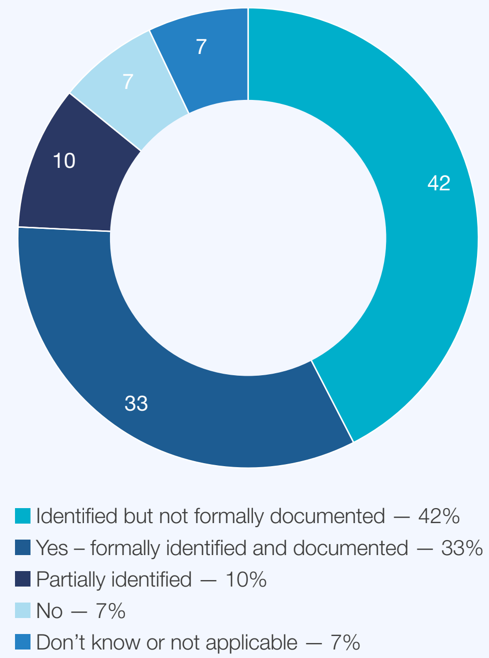
Around half of companies (49%) reported no significant change in access to critical inputs. Among those reporting a change, access was much more likely to have become constrained (34%) than improved (9%), a ratio of nearly four to one.

Identification and documentation:

Most companies (85%) had identified their most critical inputs in some form, but only around a third (33%) had formally identified and documented them. The largest group (42%) had identified their inputs without formally documenting them.

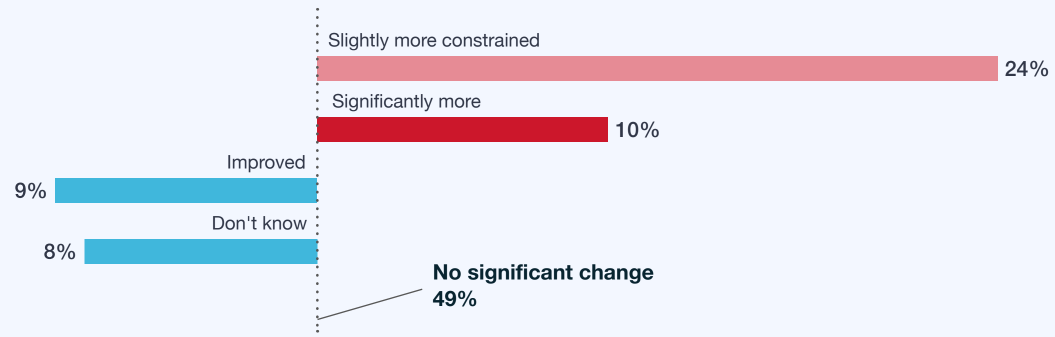
Documentation rose steeply with company size: around four in five large companies had formally documented their critical inputs, compared with 29% of SMEs.

Figure 9: **Identification and documentation of critical inputs**



- Source: Company turnover band.
- Base: 194 responses.

Figure 8: **Change in access to critical inputs over the last 12 months**



- Source: Q6. Compared with 12 months ago, how has access to your company's critical inputs changed?
- Base: 153 responses.
- Percentages may not sum to exactly 100 due to rounding.

Figure 10: **Formal documentation of critical inputs by company size inputs**

- Source: Q5. Has your company formally identified and assessed its most critical supply inputs?
- Base: 153 responses.
- Percentages may not sum to exactly 100 due to rounding.

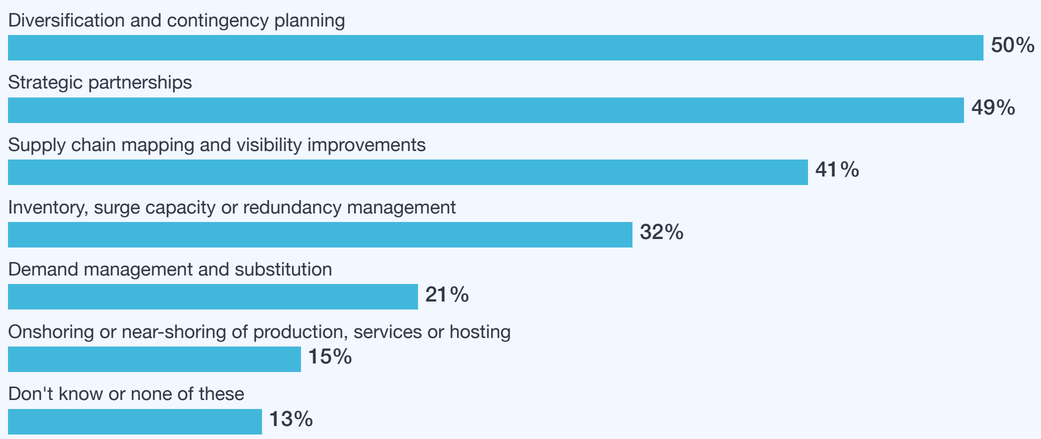
6.5 Resilience actions: Diversification and partnership

Diversification and contingency planning (50%) and building strategic partnerships (49%) were the most commonly reported resilience actions. Improving supply chain mapping and visibility followed (41%), then managing inventory, surge capacity or redundancy (32%). Companies taking action pursued more than two measures on average.

Onshoring and near-shoring were named by 15% of seven companies..

Around one in seven SMEs (14%) reported taking no resilience action at all.

Figure 11: **Actions companies are taking to strengthen supply chain resilience and readiness**



- Source: Q7. Which actions is your company currently taking to strengthen supply chain resilience and readiness?
- Resilience actions draw on the UK Government's National Protective Security Authority's guidance for business.
- Base: 154 responses.
- Respondents could select all that apply, so percentages do not sum to 100.

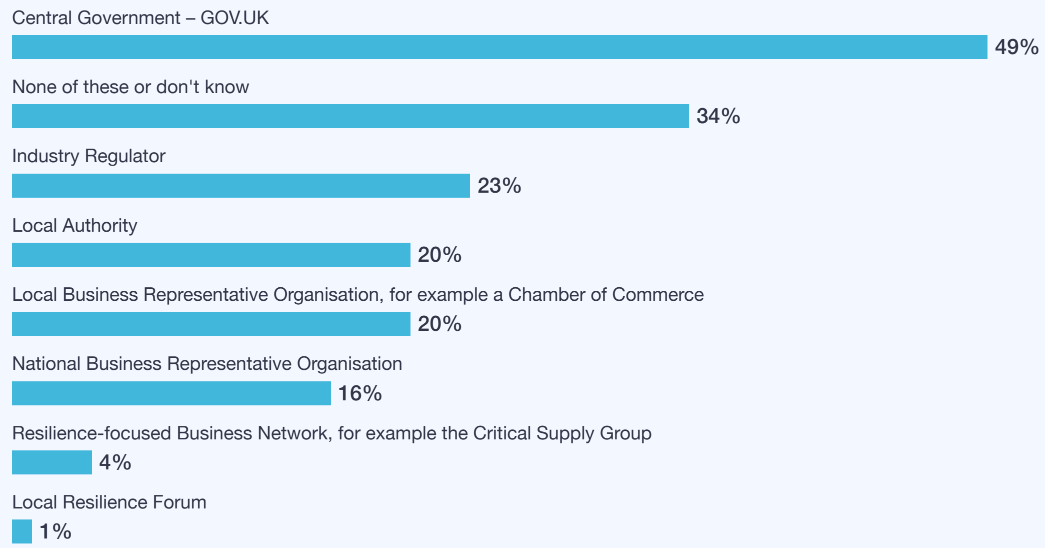
6.6 Sources of resilience information

Government is the most-used source of resilience information, although many companies are not engaged with any formal source.

Nearly half of companies (49%) reported using GOV.UK to inform resilience decision-making. Around a quarter (23%) cited industry regulators, while local authorities and business representative organisations were each cited by one in five companies (20%).

More than a third (34%) reported using none of the listed sources or did not know where they would turn for resilience information. This pattern was confined almost entirely to SMEs. Of those with no identified source, around eight in ten (79%) had also not formally documented their critical inputs, suggesting lower levels of formal resilience planning.

Figure 12: **Sources informing resilience and emergency preparedness decisions**



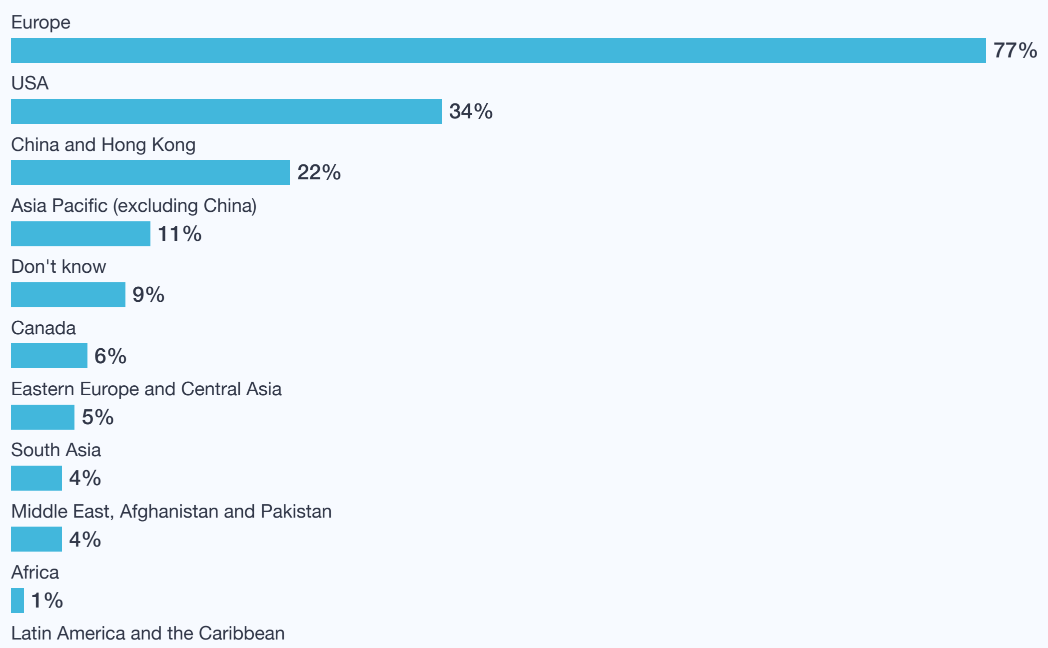
- Source: Q8. Which sources currently inform your company's decision-making on resilience and emergency preparedness?
- Base: 152 responses.
- Respondents could select all that apply, so percentages do not sum to 100.

6.7 Trusted supply regions

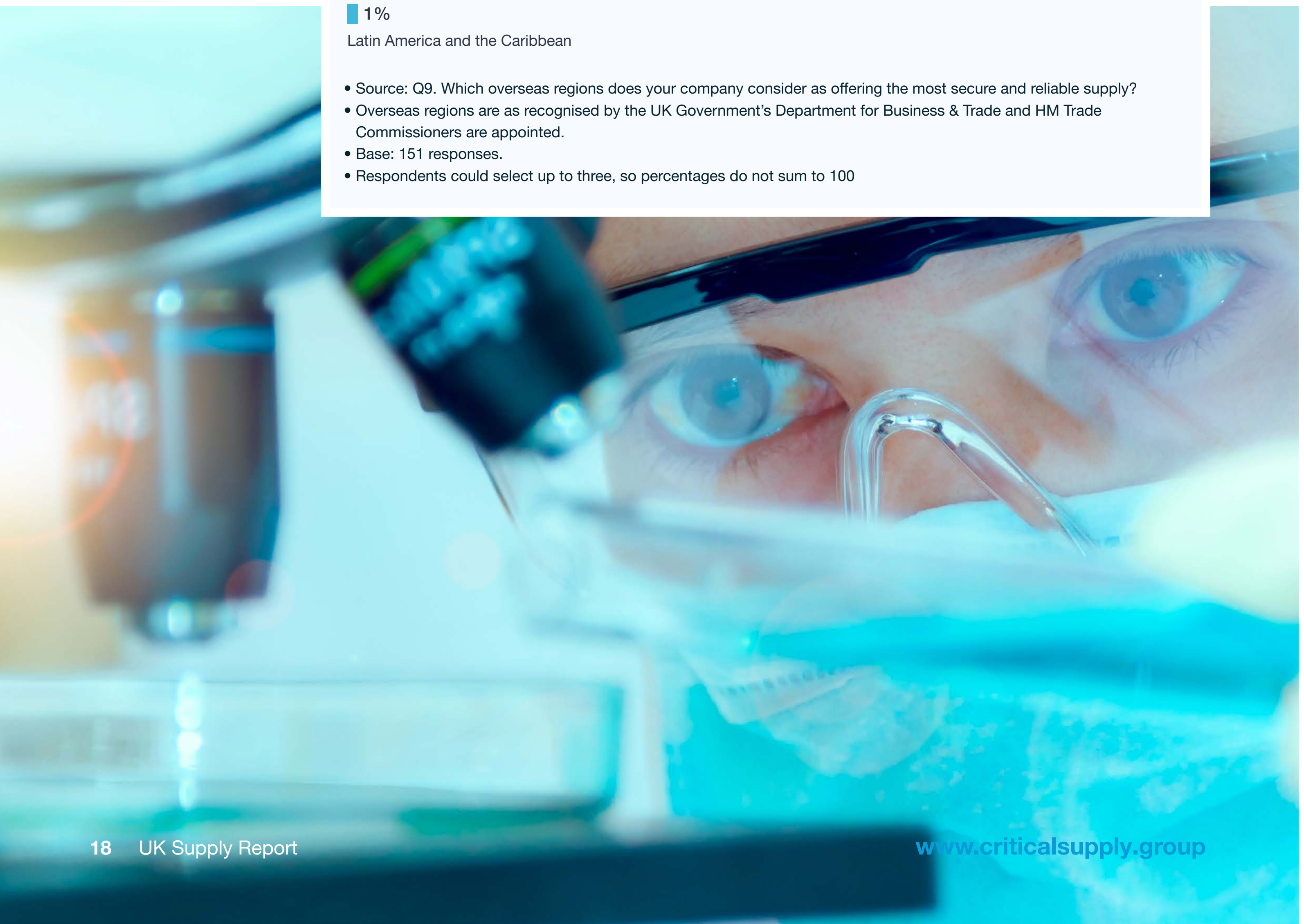
Three in four companies (77%) identified Europe as the global region offering the most secure and reliable supply, well ahead of the United States (34%) and China and Hong Kong (22%).

The preference for Europe was stronger still among large companies (82%) than SMEs.

Figure 13: **Regions considered to offer the most secure and reliable supply**



- Source: Q9. Which overseas regions does your company consider as offering the most secure and reliable supply?
- Overseas regions are as recognised by the UK Government's Department for Business & Trade and HM Trade Commissioners are appointed.
- Base: 151 responses.
- Respondents could select up to three, so percentages do not sum to 100



7. Further Recommendations

The Critical Supply Group welcomes engagement from businesses, government, academia and other organisations interested in contributing to strengthening critical supply chains, in the UK and internationally.

Recommendations for government, public operators, strategic suppliers, tier 1 contractors and other major buyers in the UK:

1. Clearer governance, coordination and strategic direction:

- **Cross-government Ministerial ownership –** Establish clear Ministerial accountability, led by the Department for Business & Trade and Cabinet Office as key cross-government departments for UK supply chains and national resilience and readiness, including structured and recurring public–private engagement aligned to national resilience priorities. Convening platforms such as the Critical Supply Group can support this coordination.
- **Policy alignment and rationalisation –** Strengthen coordination and visibility across existing policies, guidance, platforms, communications channels, studies and networks. Support the Department for Business & Trade's new Supply Chain Centre and its Global Supply Chains Intelligence Programme through complementary industry evidence and business insight, including via initiatives such as the Critical Supply Group.
- **Working cross-sector –** Support collaboration and working cross-sector, including through trade associations such as those collaborating on the UK Supply Survey, to reduce fragmentation, improve alignment, efficiency and impact.
- **Industrial Strategy alignment –** Greater emphasis on CNI sectors and critical supply chains in the UK's Government Industrial Strategy delivery, for national resilience and readiness, as well as economic growth.
- **Europe and Trade Strategy –** Recognise the importance of UK-European trade and wider trusted international partnerships to resilient critical supply chains, including through Trade Strategy delivery, strategic procurement and industry dialogue, whilst maintaining the UK's leadership on open and rules-based trade.
- **Public communications campaign –** Develop a joint industry-government communications initiative to increase engagement with supply chain resilience and highlight the national security and economic value of investment in critical sectors, particularly energy, transport and defence. Support coherent definitions, consistent messaging and stronger engagement with trusted information sources across government and industry.

2. Further leverage procurement reform to reward resilience and capability:

- **Strategic procurement –** Embed supply chain resilience, domestic capability and long-term supply security as recognised value criteria within public procurement decisions, aligned to the National Security Strategy and UK Government Resilience Action Plan. Also, including clearer resilience criteria and reporting expectations for major contractors and CNI operators.
- **Procurement implementation –** Work with and across industry to fully leverage the Procurement Act 2023 to further simplify procurement and tendering routes in critical sectors, such as through consolidation of overlapping frameworks, simplified pre-qualification processes and proportionate compliance requirements, particularly for SMEs. This can build on the June 2026 UK government guidance on using the Act's national security exemption to prioritise resilience[8] in critical sectors, ensuring implementation also widens access for capable UK suppliers.
- **Accreditation and compliance –** Look for ways to streamline or otherwise reduce accreditation and compliance demands, for example by greater collaboration between regulators and consolidation of standards.
- **Procurement and supply chain leadership –** Recognise the central role of procurement and supply chain professionals in delivering resilience and readiness, and through forums such as the CSG establish more regular and structured engagement to inform policy, commercial strategy and implementation.

3. Connect more UK capability to commercial opportunity:

- **Forward procurement visibility –** Standardise and improve publication of forward procurement pipelines across critical sectors to increase predictability, enable earlier supplier engagement and support investment planning.
- **Early supplier engagement –** Encourage earlier and more direct commercial engagement between major buyers and capable UK firms, particularly SMEs, through structured market engagement processes and use of established networks, such as business representative organisations.
- **National supplier visibility mechanism –** Develop a structured and regularly updated mechanism to improve visibility of UK supplier capability across critical sectors, informed by initiatives such as the UK Supply Survey.
- **Deepening existing supply –** Establish sector-led supplier development programmes, supported by relevant government departments, sector regulators and business representative organisations, to enable UK companies already supplying critical sectors to scale their participation through targeted procurement pipelines, capability mapping and structured buyer engagement. Also support within delivery attached to the UK Government's Industrial Strategy and Plan for Small and Mid-Sized Businesses.
- **Widening supply across sectors –** Establish structured entry pathways that enable UK companies to deploy existing adaptive capability into additional critical sectors, including earlier market engagement, clearer forward pipeline visibility and cross-sector capability mapping. Where appropriate, this should include greater use of dual-use capability.

[8] https://www.gov.uk/government/news/government-procurement-to-prioritise-national-security

4. Enable resilient companies and secure critical inputs:

- **SME risk mitigation –** Recognise that while SMEs are essential to resilient supply chains, smaller firms may face proportionately higher exposure to operational and financial shocks. Develop proportionate risk-sharing and support mechanisms - including phased contracting, framework access, and resilience-linked insurance and incentives - to enable SME participation without transferring excessive risk.
- **Access to critical inputs –** Support or incentivise companies to identify and secure their most critical inputs, such as through supply chain diagnostics, critical input assessments, access to new suppliers, collaborative procurement and delivery of relevant government strategies, aligned to the Supply Chain Centre's work.[9]
- **Resilience capability and access support –** Expand access for UK companies, of all sizes, to practical resilience and readiness expertise, diagnostics and advice, including partnership facilitation and incentives for near-shoring or domestic capability development. Ensure guidance and support are clearly accessible, integrated alongside commercial opportunities, and easy to navigate across government platforms such as GOV.UK and the UK Supply Chains Centre.
- **Carbon border readiness –** From January 2027, the UK Carbon Border Adjustment Mechanism is due to apply a carbon price to imported aluminium, cement, fertiliser, hydrogen, iron and steel, several of the critical inputs this survey identifies companies as dependent on and as sourcing from overseas. Treat CBAM readiness as part of supply chain resilience rather than a separate environmental track, and ensure SMEs in particular are supported to prepare for the cost and reporting requirements.
- **Energy cost and resilience –** Recognise energy as the dependency companies most rely on to operate and the concern they raise most often, and treat its cost and security as a cross-cutting supply chain resilience issue, not than a matter for the energy sector alone. Reflect the operational and competitiveness impact of energy costs on UK manufacturers within industrial, energy and resilience policy.

5. Building a shared evidence and intelligence base:

- **Import dependency analysis –** Continue to strengthen understanding and prioritisation of the UK's critical supply inputs and import dependencies, including origin, concentration, criticality and substitution options, to inform strategic procurement, trade policy and resilience planning. This should complement and align with the work undertaken by the UK Supply Chain Centre and related government capability.
- **Data and AI –** Accelerate the use of shared data, artificial intelligence and other emerging technologies to strengthen supply chain mapping, supplier identification, vulnerability assessment and predictive resilience. The Critical Supply Group is available to contribute complementary business insight and data, alongside system-level analysis such as via the Supply Chain Centre, the Government Office for Science[10] and other relevant initiatives.
- **Extend UK Supply Survey & Report –** Develop the UK Supply Survey & Report as a recurring longitudinal study that provides an independent, business-led evidence base to improve understanding of critical supply chains, support ongoing monitoring of resilience and supply gaps, and inform policy, procurement and investment decisions.

[9] https://www.gov.uk/government/publications/supply-chain-centre-mission-statement-and-action-plan
[10] https://www.gov.uk/government/publications/global-supply-chains-a-foresight-report-on-risk-and-resilience/global-supply-chains-a-foresight-report-on-risk-and-resilience#acknowledgements

Recommendations for SME suppliers:

The survey findings also point to practical actions SMEs supplying critical sectors can take directly:

- **Use available government guidance and tools –** Make use of the resilience, preparedness, economic security and supply chain guidance available through GOV.UK and associated government functions, including:
    - National Protective Security Authority supply chain and Protected Procurement guidance, developed with the Chartered Institute of Procurement & Supply (CIPS).
    - Economic Security Advisory Service (ESAS), a Department for Business & Trade service offering guidance and tools to help businesses strengthen resilience.
- **Undertake a supply chain diagnostic –** Identify and assess the most critical inputs and the points at which they are most exposed, as a basis for prioritising action. Practical guidance and diagnostic resources are available through the Critical Supply Group.
- **Engage proactively –** Seek out buyers, pipelines and market engagement opportunities, including through supplier development programmes and established networks.
- **Make use of business representative organisations –** Draw on, and ask more of, the business representative organisations, such as trade associations and Chambers of Commerce, on supplier visibility, buyer engagement and resilience support.
- **Document critical inputs –** Move from informal awareness to a formal record of critical inputs and where they are most exposed. Documentation does not prevent disruption, but it provides the visibility to respond quickly when an input comes under pressure.
- **Connect to a trusted information source –** Draw on at least one formal source of resilience and preparedness information, such as those listed available through GOV.UK or a business representative organisation, rather than relying on none.
- **Pursue accreditation and pre-qualification early –** Where supplying a sector depends on accreditation or registration, begin the process early, since access and process, are the main barriers SMEs face to supplying critical sectors.
- **Diversify and build partnerships –** Strengthen resilience through diversification and strategic partnerships, the two approaches companies most commonly take, rather than relying on a single supplier or route.

Recommendation for all:

- **Do not wait for a crisis –** Action is typically more effective and less costly before disruption than during it. The risks to critical supply chains are clear, and the case for acting early is stronger than the case for waiting.

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8. Definitions

This report applies the following definitions:

Business representative organisations – Entities that represent and support multiple businesses, such as trade associations, sector bodies and Chambers of Commerce.

Capability – The ability of a supplier to meet a specific requirement.[11]

Capacity – A measure of the rate at which the operations function can transform its inputs into a quantity of product or service outputs in a given timescale.[12]

Critical National Infrastructure (CNI) – Critical elements of infrastructure (namely assets, facilities, systems, networks or processes and the essential workers that operate and facilitate them), the loss or compromise of which could result in: a) Major detrimental impact on the availability, integrity or delivery of essential services - including those services whose integrity, if compromised, could result in significant loss of life or casualties - taking into account significant economic or social impacts; and/or, b) Significant impact on national security, national defence, or the functioning of the state.

Critical sectors – In this report, a collective term for sectors that are important to the operation of Critical National Infrastructure, essential services, national resilience, economic security and defence. The term includes the UK's 13 designated Critical National Infrastructure sectors and, where relevant, the wider supply chains that support them.

Critical supply chains – CSG defines critical supply chains as those that enable critical infrastructure and essential services to function, and therefore underpin national security, resilience to shocks and sustainable economic growth.

Critical supply inputs – This report defines critical supply inputs as materials, components, technologies, data, utilities, services or systems that are essential to company operations and the delivery of goods and services. Examples may include critical software; semiconductors; cameras, lenses and optical components; lasers; primary and rechargeable batteries; and PCBs, as well as critical minerals such as aluminium, iron, silicon, zinc, and others listed in the UK Government's Critical Minerals Strategy.[13]

[11] https://www.cips.org/intelligence-hub/glossary-of-terms
[12] https://www.cips.org/intelligence-hub/glossary-of-terms
[13] https://www.gov.uk/government/publications/uk-critical-minerals-strategy/vision-2035-critical-minerals-strategy

Diversification – Reducing dependency on a single supplier, customer, market, route, location or input by increasing the number or variety of available options.[14]

Readiness – Readiness is a related, but distinct idea to Resilience. The distinction matters in practice: readiness can be assessed ahead of a disruption, whereas resilience is often only demonstrated during one. Readiness therefore provides a way to test whether resilience can be relied upon before it is needed, rather than after.[15]

Resilience – Supply chain resilience refers to the capacity of the supply chain to continue to function and recover when things go wrong. Across the literature, authors use different terms, but they consistently describe three connected capabilities that underpin supply chain resilience: withstanding disruption, adapting to it, and recovering from it.[16]

Sovereign capability – The capability of UK-based companies to supply goods, services and critical inputs that support Critical National Infrastructure, essential services, national resilience, economic security and defence. In this report, it refers to existing capability within the UK supply base, informed by companies' own assessments of what they currently supply or believe they could supply.

CNI sector definitions:

The UK Government's National Protective Security Authority[17] has published definitions of the country's 13 designated Critical National Infrastructure sectors[18] :

Chemicals – A diverse manufacturing sector of which the primary activity is the conversion of raw materials into essential products for other sectors and consumers. The sector routinely stores, uses and manufactures hazardous chemicals such as fertilizers, pesticides, and explosive pre-cursors in accordance with extensive regulatory requirements.

Civil Nuclear – Involved in the generation of electricity through nuclear reaction. It involves the construction, operation, and decommissioning of nuclear power plants. Nuclear powered electricity generation is expected to increase significantly in the UK as we move away from fossil fuel-generated electricity. As the sector grows, including the building of Small Modular Reactors (SMRs), the civil nuclear sector will become an increasingly important CNI sector requiring robust protective security.

Communications – Consists of four sub sectors: i) Telecommunications – Wired, wireless and satellite communications infrastructure such as that which supports internet connectivity and mobile phone network coverage; ii) Data Infrastructure (data centres and cloud infrastructure) – Used to store and process much of the data generated in the UK, ranging from data belonging to individuals to data and processing which underpins other CNI sectors; iii) Broadcast – The infrastructure underpinning television and radio transmission, including that used for emergency broadcasts; and, iv) Postal services – Includes postal, courier and delivery services.

Defence – Comprises the Ministry of Defence – Department of State, National Armaments Director Group, Military Strategic Headquarters and Defence Nuclear Enterprise; the three Services – Royal Navy, Army and Royal Air Force; Cyber and Specialist Operations Command; 24 agencies and public bodies and an extensive and complex supply chain across both the public and private sectors.

Emergency Services – Comprised of four sub-sectors; police, fire and rescue, ambulance and coastguard. CNI with the sector is limited to large and/or strategically significant or specialised assets.

Energy (Electricity, Gas, Oil) – Consists of electricity, oil and gas subsectors and covers the generation, storage and transmission of energy both on and off-shore. Energy provision is essential at an industrial/commercial and domestic level, making it a key interdependency across all other CNI sectors. The need to boost the UK's energy independence brings with it a requirement to increase the security and resilience of our domestic infrastructure.

Finance – Comprises the systemic 'backbone' of financial services (payment systems, clearing and settlement systems, exchanges and messaging systems) and financial institutions. It provides the infrastructure which underpins the processes on which government, businesses and individuals rely for their financial transactions.

Food – Whilst the provision of food is essential, the food sector has no individual assets which are designated at CNI. The sector has a significant level of resilience in the event of a crisis owing to global sourcing of food, supply chain alternatives, and commercial competition providing incentives for operators throughout the sector to step in if difficulties arise.

Government – Government provides a range of essential services through its nationwide infrastructure. The sector encompasses every aspect of government (excluding defence) including: the four Parliaments, government departments, elected officials and the democratic processes - such as elections - by which they are elected.

Health – Diverse and complex, ranging from individual GP practices to large hospitals. CNI with the sector is limited to large and/or strategically significant or specialised assets.

Space – Typically made up of two key components: ground infrastructure and orbital infrastructure. The ground infrastructure includes the systems, people and supporting functions which enable the delivery of space services. The orbital infrastructure consists of the satellites which either deliver services in their own right or provide the data for others to deliver services.

Transport – Consists of four sub-sectors; road, rail, aviation and maritime. Whilst the sectors are broad, CNI within these sectors is limited to significant assets such as major ports, airports and train stations, and strategically important management systems/assets such as air traffic control.

Water – Encompasses drinking water and wastewater treatment plants and the associated supply and waste networks. The sector is responsible for the provision of drinking water to the general public, commencing with the extraction of raw water, through to treatment, storage and distribution to the consumers. The sector is also responsible for the whole process of the safe and environmentally sound disposal of sewage. This commences at the collection of sewage from properties through the foul drainage system, on to the sewage treatment works and then to disposal.

[14] https://www.cips.org/intelligence-hub/glossary-of-terms
[15] As defined by Professor Aristides Matopoulos, Professor of Supply Chain Design, Cranfield University
[16] https://www.emerald.com/ijlm/article-abstract/20/1/124/136917/Understanding-the-concept-of-supply-chain
[17] https://www.npsa.gov.uk/
[18] https://www.npsa.gov.uk/about-npsa/critical-national-infrastructure

9. About the Critical Supply Group

Daily life depends on critical supply chains.

The Critical Supply Group (CSG) is a business-led, cross-sector alliance of companies and professionals working together to strengthen critical supply chains, in the UK and internationally.

The Group is managed by:

MAP UK & International – Strategic supply chain and international trade specialists: www.mapukinternational.com

CSG supporters include:

Made in Britain – Independent, industry body representing 2,200+ UK manufacturing companies, of which 95% are SMEs: www.madeinbritain.org

The Critical Supply Group welcomes engagement from businesses, government, academia and other organisations interested in contributing to strengthening critical supply chains, in the UK and internationally.

For collaboration opportunities or enquiries relating to the UK Supply Survey & Report, the Critical Supply Group or related initiatives, please contact info@mapukinternational.com.

Disclaimer

While every effort has been made to verify the accuracy of the information in this report, MAP UK & International cannot accept responsibility or liability for any reliance placed on it, or on any of the information, opinions or conclusions it contains. The findings reflect the views of the companies that responded to the UK Supply Survey 2026 and the analysis of MAP UK & International on behalf of the Critical Supply Group; they do not necessarily reflect the views of the collaborator organisations listed in the acknowledgements.

This report is provided for general information only and does not constitute legal, financial, commercial or professional advice.

The UK Supply Survey & Report 2026 is a Critical Supply Group initiative, managed by MAP UK & International.

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