

ARTICLES

Moving Pictures

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In 'the most challenging time' for the profession, the ISM World 2025 Annual Conference is designed to inspire and celebrate genius amid global challenges and an ever-changing supply chain canvas.



By Dan Zeiger



Key Takeaways

- As the profession convenes for the ISM World 2025 Annual Conference in June, many of the challenges from the coronavirus pandemic remain, and new ones have emerged.
- Sessions will focus on or discuss geopolitical dynamics, many of which are rooted in the breakdown of the U.S.-led global order that emerged after World War II.
- Despite the increasingly high job demands in supply management, there are many opportunities to seize and victories to celebrate.

In many ways for supply management professionals, the last five years has felt as if Rod Serling has guided them through a "Night Gallery" exhibit, with each painting more striking and stomach-churning than the last

A trade war and tariffs turbulence, the coronavirus pandemic, product shortages and delays, persistent inflation, climate events of higher frequency and intensity, geopolitical tensions and more tariffs uncertainty have wreaked havoc on companies and supply chains. With the return of Donald Trump to the White House and subsequent workforce shedding at and funds pausing for federal agencies, the picture has become even more cloudy.

Early in the COVID-19 era, veteran supply managers and executives told *Inside Supply Management*[®] that, despite the business-crippling turmoil as the virus spread around the globe, the Great Recession remained the most challenging period of their careers. As the pandemic progressed, however, sentiment began to shift.

As the profession prepares to convene at ISM World 2025, Institute for Supply Management[®]'s (ISM[®]) 109th Annual Conference on June 1-3 at the Rosen Shingle Creek Resort in Orlando, Florida, many of the COVID-19 dynamics remain. And new challenges have emerged — including more complex regulatory frameworks, continuing labor strife and heightened cybersecurity vulnerability — raising supply management to an all-time high in degree of difficulty.

"I would say yes, this is the most challenging time," ISM CEO Thomas W. Derry says. "None of the pandemic issues have been completely removed, and things have been layered on. Even in the Great Recession, if you had a cost-effective supply chain strategy, you could get by or even do great. COVID-19 not only shifted demand, but also created supply disruptions unlike anything we've experienced."

He adds, "Because the supply management profession is so central to how the world functions, the scope of what we have to source and manage is getting broader. So, the job is getting bigger."

With the theme "Sparkling Genius," ISM World 2025 is designed to shed light on solutions to the challenges that have somewhat darkened the supply chain landscape, particularly geopolitics.

Gina M. Raimondo, U.S. Secretary of Commerce during the Biden administration, who devoted much of her duties to global events and their impacts on economic forces and supply chains, will be the closing keynote speaker. And multiple sessions will focus on geopolitical issues and how they affect such disciplines as trade compliance, logistics management and supply chain resiliency.

"There are a lot of challenges, and when you layer them, it creates a really complex environment," says session presenter Jonathan Todd, vice chair of transportation and logistics law at Benesch, Friedlander, Coplan & Aronoff LLP, a national law firm based in Cleveland. "I see it as a textbook sales and operations management problem. And when supply chain professionals address that problem, that's when they shine."

Todd's session, "What To Do *Now* About International Trade Compliance: 2025 News Headlines Edition," is scheduled for June 1. His presentation will be a work in progress until the Conference — because on this current visit to the supply chain night gallery, there are likely more paintings to be unveiled.

"Like the title says, the theme of the session is the headlines, discussing the here and now," Todd says. "And we don't know what the world will look like in June. That's how fast everything is moving."

The Looming End of the Global Order

John Hughes, a Washington, D.C.-based partner and head of client strategy at global advisory firm DGA Group, identifies three key trends, which are related to one another: (1) China is building alliances around the globe, while U.S. relationships with its allies are beginning to fray, (2) countries around the world are questioning the benefits of free trade, with a move towards economic resiliency, and (3) geopolitical "swing states" are emerging.

Those swing states are among the Group of 20 nations but outside the G7 — countries like Saudi Arabia, South Africa and Brazil — that can exert influence, in big part by how they align with the U.S. and China on various issues.

"So, that creates instability," says Hughes, who is scheduled to co-present the session "Geopolitical Supply Chain Update" at the ExecIn event for senior executives (vice president and above) on June 3. "It's been trending that way for a while. Fast forward to today, and this is accelerating further."

Derry reiterates the topic of his Voices column in the January/February issue of *Inside Supply Management*[®]: From the 1990s through the mid-2010s, the supply chain rules of the road were simple — leverage spend volume and seek the lowest available cost — because the system of global trade was simple and steady.

"It was about opening markets in new countries, because the barriers to trade were lowered, not erected," he says. "Those assumptions no longer apply because countries are making different assessments on the benefits and pitfalls of international trade."

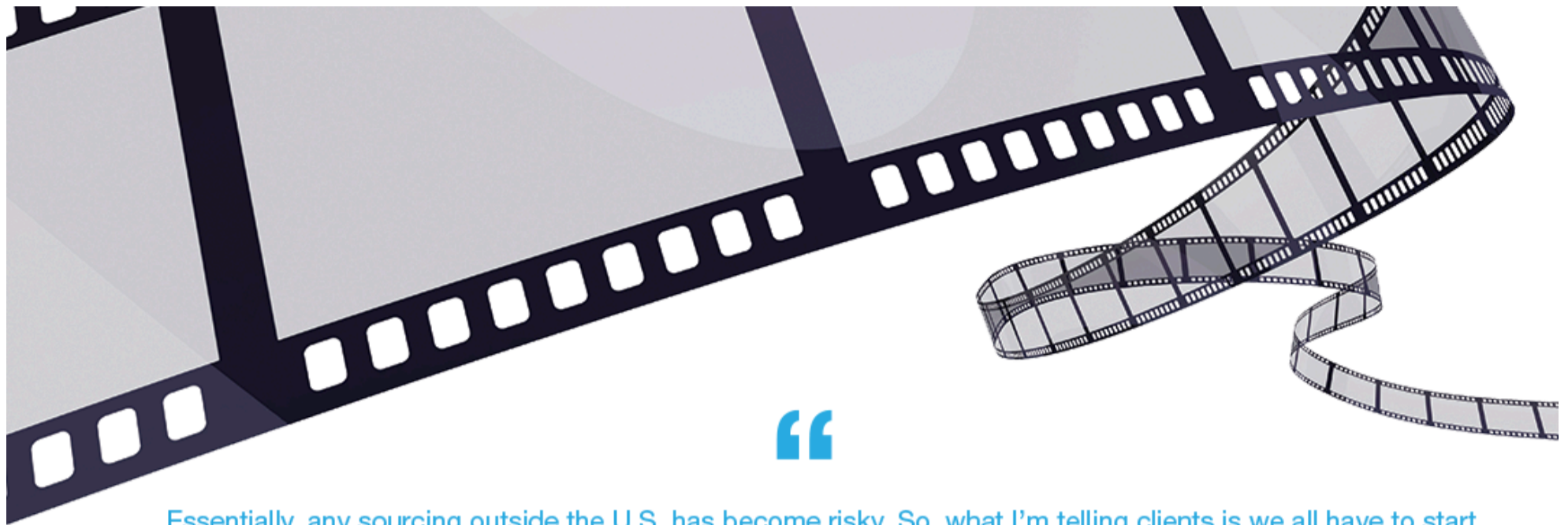
Derry continues, "The geopolitical situation is very fluid, to put it diplomatically."

Ultimately, the world might be witnessing the breakdown of the U.S.-led, post-World War II global order. It's been anticipated for decades — through the end of the Cold War, costly U.S. military actions in Iraq and Afghanistan, the global economic collapse of 2008-09, the pandemic and growing distrust in institutions. And the implications for supply chains could be momentous.

"In my lifetime, the U.S. has been the sole superpower and guarantor of security for Europe, Japan, Korea, the list goes on," Hughes says. "No one was able to challenge this supremacy, and the U.S. saw trading relationships with its allies and partners as a key of stability. This provided some predictability and expanded free trade, broke down borders and created increasingly complex

supply chains. All of that is essentially now being called into question.”

That dynamic has been most evident with tariffs.



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— JONATHAN TODD

Benesch, Friedlander, Coplan & Aronoff LLP



The Harshest New Reality: Higher Costs

In September, Raimondo was a speaker at the Supply Chain Summit, hosted by the Commerce Department and the Council on Foreign Relations, a New York-based think tank. During a panel discussion, she said that protectionist trade policies should be targeted and wielded judiciously.

“I think both tariffs and export controls should be used in a way that is as narrow as possible to protect our national security,” she said. “And anyone who works for me knows I strongly believe we should not use export controls, particularly, as way to give the U.S. economic advantage. That’s not what they’re used for.”

In a post-2018 trade war world, such restraint is not always the case. Derry cites two examples:

- Six years ago, Japan imposed export restrictions against South Korea for materials used in semiconductor production, in response to a court ruling that mandated Japanese companies compensate victims of forced labor in Korea. The controls were lifted in 2023, after South Korea filed a complaint with the World Trade Organization.
- In January, Trump threatened duties on products from Colombia unless that country accepted deportees from the U.S.

“Those situations had nothing to do with the trade relations between the countries,” Derry says. “But in recent years, we’ve seen countries use tariffs or the threat of them in a way that was not commonly accepted behavior in the past.”

In January, Trump announced duties of 25 percent on products from Canada and Mexico, which took effect March 4 after a 30-day pause. As Inside Supply Management® went to press, Trump largely suspended those duties, again, until April.

The result is a shrinking “spectrum of risk,” Todd says: “Procurement organizations knew the riskiest tariff countries, with China on the extreme end. They understood that North America was on the safer side of that spectrum. But that spectrum has collapsed.”

It’s critical, Todd says, that companies (1) be aware of which products and situations tariffs apply to, (2) have robust dialogue with suppliers on which party will absorb the costs and (3) have optionality, including alternate sources.

“A company should have as many options as possible, so it doesn’t fall into a short-term trap,” Todd says. “You can quickly find that the cost burden is higher than you thought, and it’s not easy to pass on to customers.”

Ultimately, he says, there’s a broader discussion to be had about a game that began in 2018 and is still in the early innings: As production and sourcing become more regionalized and domestic and supply chains shrink, everyone — companies and their consumers — must be prepared to pay up.

“Essentially, any sourcing outside the U.S. has become risky,” Todd says. “So, what I’m telling clients is we all have to start accepting that we’re in a higher operating cost environment. There are questions about how long it will take and how much pain there will be. But that’s where all roads lead.”

And it will likely be a topic of conversation in Orlando.

Finding Opportunities and Celebrating Victories

At the Supply Chain Summit in September, Raimondo said, “The biggest lesson I’ve learned is that supply chains are complicated, and the answer is often in the minutiae. I have learned that you have to get deep into the supply chain and figure out where chokepoints and points of vulnerability are, and then do your best to make sure you have some amount of resiliency or redundancy.”

Derry says he expects resiliency to be a focus of Conference chatter: “Are risk and resilience the new dominant theme for supply chains? It used to be total cost,” he says. “I’ll be curious to see and hear if resiliency has become more important, because if I have the lowest cost for a widget I can’t get, it doesn’t matter.”

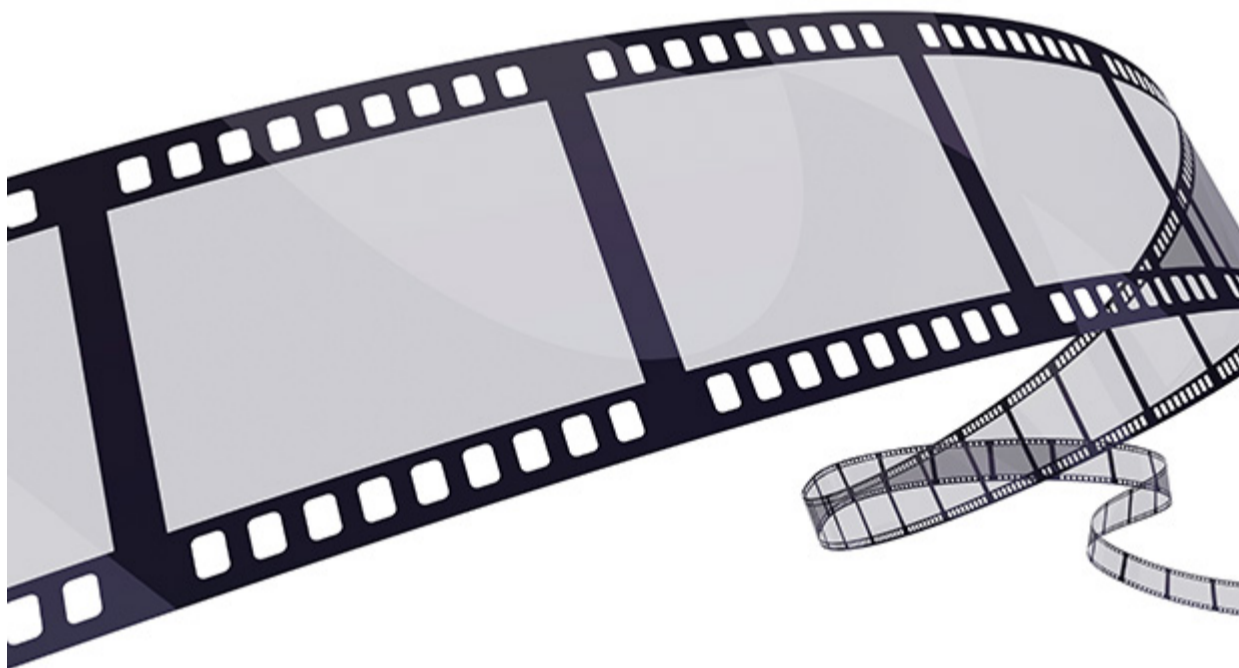
While uncertainty will be a dominant theme when supply management professionals convene, Hughes says, it can breed opportunity. “There are discussions to have on how best to navigate this new situation, particularly in the U.S.,” he says. “What can you learn about market access, entry and expansion? What do you have to do, for example, from a communications perspective to position yourself for a certain opportunity?”

Such learning and networking opportunities offer a respite from the harsh realities of current global business conditions, but it’s hardly all doom and gloom. After all, Derry says, the turmoil of recent years has enabled the supply management profession to refine — in some cases, master — its art, and such achievements will be exhibited and celebrated at ISM World 2025.

“The job is harder, with the bigger scope and higher expectations,” he says. “But our impact is bigger. The respect we’re earning is greater. The centrality of what we do to fuel the success of our companies has never been more evident.

“So, welcome to the show.”

(Photo credit: goriss/iStock/Getty Images)



How to Ensure the Smoothest Ride at ISM World 2025

This year, Institute for Supply Management[®]'s (ISM[®]) Annual Conference takes place near some of the most popular amusement parks in the world, but attendees at the event in Orlando, Florida, are likely seeking time *away* from a roller coaster.

In the last five years, the supply management profession has been anything but a thrill ride — a near-daily stress test from which a gathering of practitioners, executives and subject matter experts can be not only a welcome reprieve, but also a shrewd career and company investment, ISM CEO Thomas W. Derry says.

“It’s been such an intense and stressful environment for so long,” Derry says. “The best place to learn is from people who have been grappling with the same problems. And you’ll learn in two places: The sessions with experts addressing key problems are important, but even more so is the opportunity to follow up with them one-on-one, as well as talk with other colleagues. That sharing of information is so critical.”

Perhaps the greatest focus enhancement at ISM World 2025 involves networking, with attendees getting a digital boost. “Smart badging” technology will help foster identification and interaction, and the ISM Events mobile app will have new scheduling options to arrange meetups on-site.

Here are other ways to get maximum ROI from the Conference, which is June 1-3 at the Rosen Shingle Creek Resort.

Maximize your schedule: Pencil in keynote sessions and review breakout session and workshop topics. Find sessions of most relevance to your job or personal interests.

Hit the ground running: The opening day of the Conference on June 1 features casual events for attendees to get to know each other or renew acquaintances, but there are critical learning opportunities. Breakout sessions cover such important supply management topics as negotiation, sustainability and international trade compliance.

Idea ignition: A new feature, Spark Conversations are scheduled throughout the Conference. These 30-minute informal and intimate sessions are bidirectional conversations between attendees and a featured supply chain leader — a unique opportunity to share professional perspectives and lessons learned with some of the profession’s best.

Easy as VIP: The VIP Experience provides priority scheduling for breakout sessions, preferred seating at the Opening and Closing General Sessions and access to an exclusive networking event.

Go team go: The Team Charity Challenge (for groups of five or more) on June 1 features a benefit competition, with prizes for Orlando experiences to be enjoyed during the Conference. The Team Experience package includes a private meeting room for debriefing and planning, with audio/video support.

Share your story: The event’s hashtags are #ISMWorld2025 and #WeAreISM. *Inside Supply Management*[®] annually highlights some of the best posts from the Conference on X (formerly known as Twitter) and LinkedIn, so don’t be shy about showing your social media savviness.

Experience the extras: Round your schedule with the Women’s Supply Management Community Networking event on June 1 and black-tie ISM Award Gala (ticket required) on June 2. See the profession’s future leaders put their heads together at the ISM International Student Case Competition on June 2. And unwind and stay cool by the pool while joining ISM’s 110th birthday celebration at the Closing Party on June 3.

If you missed or want to revisit: All-Access Pass and VIP Experience holders can view on- demand versions of breakout sessions, available for 90 days afterward.

For more information, visit ismworld.org/annual. — *Dan Zeiger*



About the Author

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