

DEMAND PLANNING FOR A GLOBAL TECH COMPANY

INDUSTRY

Technology

GEOGRAPHY

CHINA

OUR ROLE

Identify and quantify demand-side risks and opportunities

FEATURES

Demand planning
Scenario analysis
Geopolitical analysis
Economic modeling

CLIENT'S PERSPECTIVE

During its annual strategic planning cycle, executive leaders at a global technology firm began considering **China's role in future revenue growth**. While this geographic exposure was beneficial in the past, recent events made executives uneasy about the potential for **over-dependence on a single region**. Their main concerns included the future of geopolitical and macroeconomic risks and opportunities bearing on technology players – i.e. providers of cloud and computing services – as well as their **impact on the company's future demand**.

THE CHALLENGE

The nature and range of uncertainty in China fall outside normal macroeconomic sensitivities. The forecast is highly **levered to political decisions** which follow a different set of incentives and constraints than long-term demographics and purely growth-maximizing choices.

The outlook is further complicated **by geopolitical factors that could result in wildly different foreign direct investment flows into China**, affecting technology transfer and productivity growth. Accurately quantifying this uncertainty required a different approach combining macroeconomic and industry forecasting with geopolitical and domestic political analysis.

ONYX SOLUTION

Onyx focuses on building actionable insights at the intersection of economics and politics. Our team of geopolitical and macroeconomic experts is uniquely positioned to:

- Identify the key policy decisions and external factors driving long-term growth in China
- Use that analysis to construct scenarios representing mutually exclusive paths China could take over the next twenty years
- Use macroeconomic, industry, and company-specific models to quantify economic and financial outcomes in each scenario
- Develop signposts to monitor and provide early warning signals



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QUANTIFYING IMPACTS

Our regional and subject-matter experts focus on a set of integrated models to forecast a range of economic outcomes based on China's key policy and geopolitical variables.

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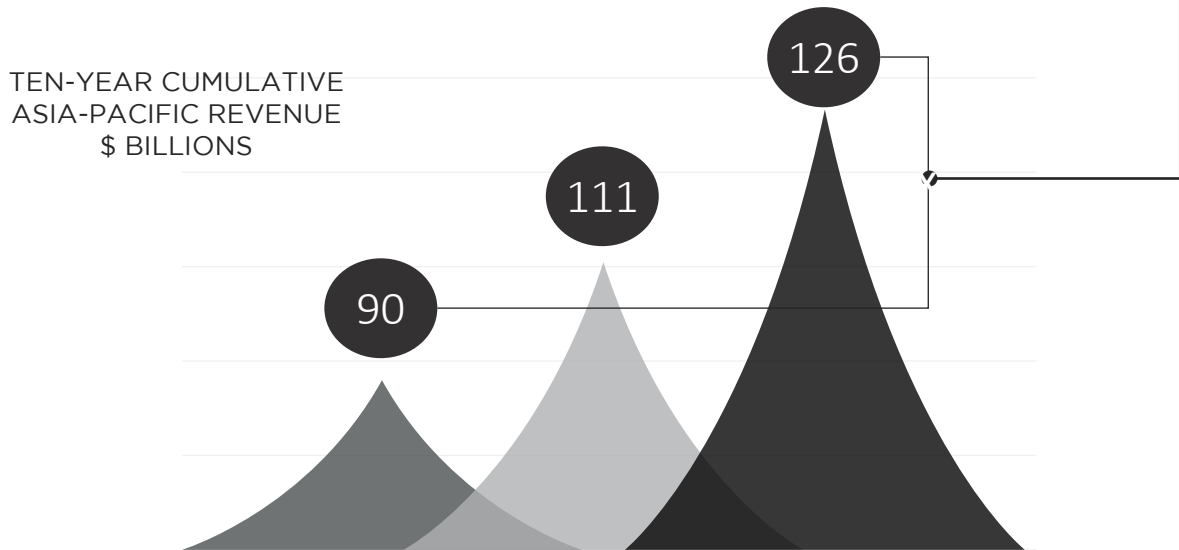
Unique scenarios modeled at the macro, industry and client levels

30+

Economic and financial variables forecast per scenario

40%

Difference in cumulative ten-year APAC revenue across scenarios



CLIENT VALUE

- 1 REDUCE UNCERTAINTY**
Identify key uncertainties and quantify their potential impact so that you can effectively prioritize issues and options
- 2 SET REALISTIC, RISK-ADJUSTED GOALS**
Utilize forecasts to establish financial performance targets on that consider non-diversifiable risks
- 3 DEVELOP RISK MITIGATION PLANS**
By understanding the key drivers of different scenarios, be able to prioritize risks and develop mitigation strategies



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Build strategy and manage risk through the lens of geopolitics and macroeconomics.

Understand the forces shaping the future of your organization

Assess their economic impact

Separate noise from signal

Find better options

OUR DIFFERENTIAL

We see the world differently.

100+

countries

350

locations

A unique global network

We are a division of Expeditors, one of the world's foremost supply chain companies. Our core team of global, regional and industry experts is complemented by our extended network of logistics and supply chain practitioners on the ground in 350 locations in 100+ countries globally.

Quantifying impact is at the heart of our value

We believe that geopolitics and macroeconomics can shape any business. But understanding them is only half the story: we combine qualitative analysis and proprietary data to quantify impact on your business and produce actionable insights.

We focus on what matters

We fully integrate macroeconomic and geopolitical analysis, unlike any other consulting firm. Our approach is tailored to the issues, geographies and industries you care about, and not boiling the ocean. We focus on getting to the so-what of politics – so you don't have to.

OUR SERVICES

We meet you where you are.

Consulting engagements

Tailored projects to identify insights, risks, and value drivers. Our experts collaborate with you to incorporate findings into your organization's strategy and planning.

Retainers

An ongoing relationship to ensure decisions remain aligned with emerging events.



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Build strategic resilience and adaptability

Strengthen risk management

Improve competitive positioning

HOW WE CAN HELP

Our capabilities help you address critical issues on global and regional strategy, supply chain resilience and risk management, including if you are:

- 01** Considering changing your global, regional or country-level strategy
- 02** Contemplating new market(s) for your products or services
- 03** Planning sourcing from new markets
- 04** Concerned about anticipating geopolitical risks to our existing strategy
- 05** Evaluating a potential partnership/JV
- 06** Conducting M&A due diligence

GLOBAL, REGIONAL, AND INDUSTRY EXPERTISE

Strength in numbers

Our project teams include experts in economics, geopolitics, policy and industry, drawn from our in-house practices and extended expert network covering a wide range of topics:

- Global, regional and country analysts
- Industry experts, including technology, retail/consumer, industrials and mobility/auto
- Energy and commodities
- ESG

PROPRIETARY DATA AND ANALYTICS

Data is at the heart of our work.

With proprietary data and analytics we quantify scenarios, assess future impact on client businesses, and elicit real trade-offs among strategic options.

We focus on the intersection of global, regional, country and client-level data to produce unique insights.

Our strength lies in the uniqueness of our data and modelling. We invest in analyzing and forecasting strategic variables typically overlooked by traditional data providers.

UNIQUE GLOBAL NETWORK

On the ground, in real time.

Covering 350 locations in 60+ countries, our network of on-the-ground supply chain and logistics experts is unique.

It allows us to develop unique strategic perspectives based on real-time developments on the ground. It adds strength to our client work by connecting strategic-level analysis with operational realities.

We keep our feet firmly on the ground and bring in our own field experience to produce unique insights.



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