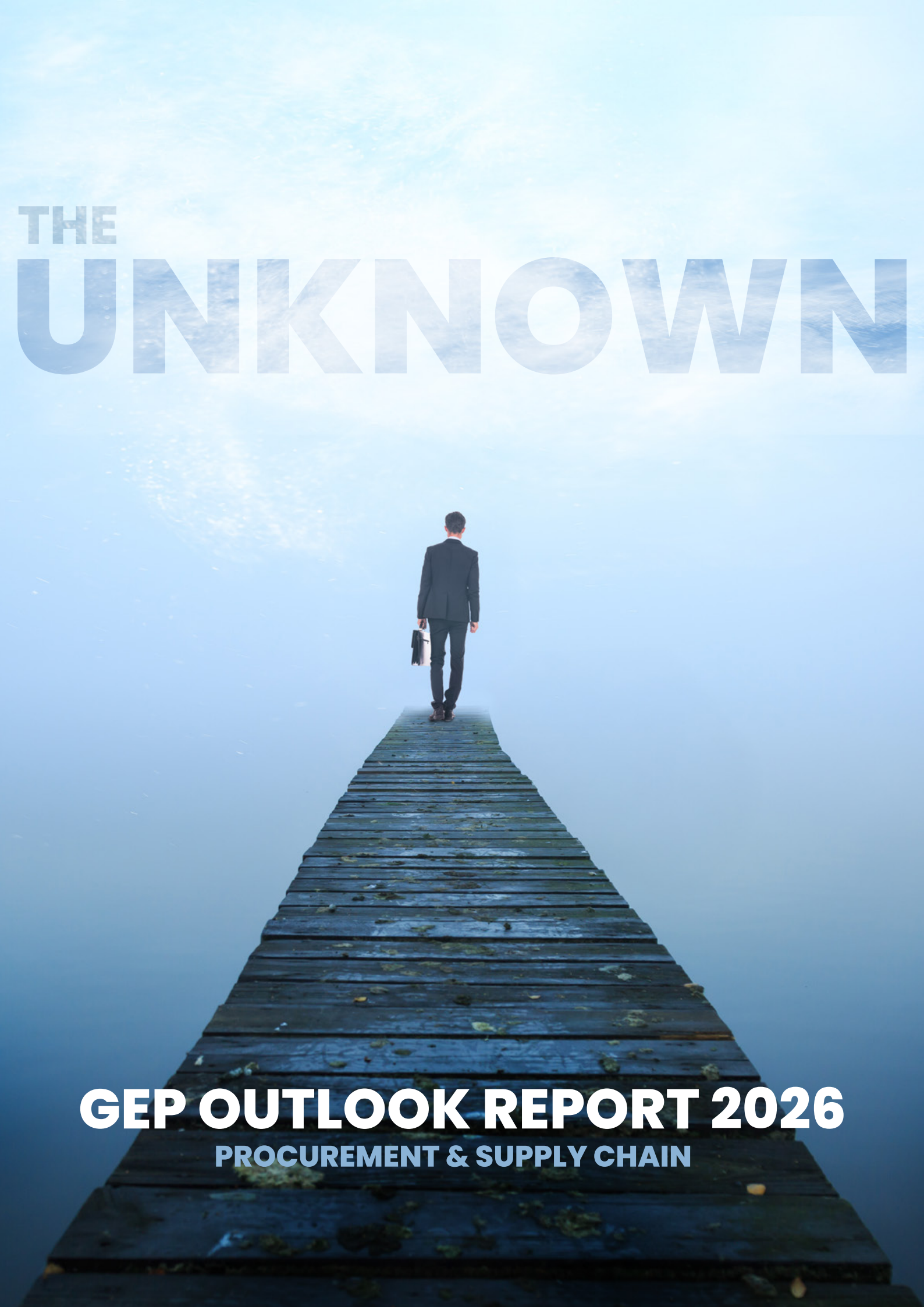


GEP OUTLOOK REPORT 2026

PROCUREMENT & SUPPLY CHAIN

Introduction

Is anyone really ready for the AI revolution?

Of course not.

And how could you be? The past six years have brought a near-constant stream of shocks and challenges to the desks of procurement and supply chain leaders. The chaos of these years — from the pandemic and natural disasters to political strife and trade wars — has juiced the ranks of corporate psychiatrists. After having re-engineered their supply networks and operating models to adapt to an ever-changing new normal, these functions now face an even greater shift.

AI is changing just about everything. Many disruptive changes will occur in 2026 and even more by 2030. Will your company be ready with a business culture that is prepared for this? Will you be part of the leadership circle that defines the pace and shape of this investment?

If only macro conditions were calmer. Trade wars continue and sources of supply remain under threat. Sentiments around capitalism, long taken for granted, are under increased scrutiny. Interest rates, job markets, inflation patterns, and other traditional fundamentals remain unsettled.

Here we go again.

GEP is a trusted advisor to leading procurement and supply chain management teams around the world. From our experience serving the Fortune 500 and Global 2000 businesses, we share our forward-looking perspective as business leaders strategize for 2026.

The GEP Outlook 2026: Procurement & Supply Chain report highlights the leadership themes and executive priorities that will dominate the corporate agenda in the year ahead.

Executive Summary

In 2026, procurement and supply chain leaders navigate a confounding environment. Global systems are more connected than ever, yet are increasingly fragmented by politics, technology, and climate constraints. The traditional emphasis on cost and supply control has expanded into a multidimensional agenda spanning efficiency, resilience, transparency, and trust. The year ahead will reward organizations that adapt their operating models to this new equilibrium by combining bold technological experimentation with disciplined governance, and a clear strategic vision.

Here are the eight leadership themes that will dominate the agenda for procurement and supply chain leaders in 2026.

Governance: The Real Innovation in the Agentic Revolution

Agentic AI is moving from concept to capability. Autonomous software agents are quietly assuming repeatable tasks such as sourcing, quoting, and supplier triage. The challenge ahead is no longer technical, but managerial: how to supervise digital decision-makers responsibly. Leading companies are developing agent governance frameworks to define access, track actions, and evaluate performance. In 2026, leadership will be measured not by the quantity of automation, but by the quality of oversight.

Culture of AI: The Missing Half of Digital Transformation

Technology adoption alone no longer creates advantage. AI delivers value only when employees trust and understand it. The most successful companies are building AI literacy across all levels, clarifying decision rights between humans and machines, and fostering a safe environment for experimentation and learning. Organizations that embed judgment, curiosity, and fluency into everyday workflows will prevent AI from becoming another stalled initiative and transform it into a source of competitive strength.

The Newest Procurement and Supply Chain Skillset: Yelling Louder

Procurement and supply chain leaders are learning to advocate for digital investment in the language of finance. The most persuasive leaders translate resilience and efficiency into tangible financial outcomes, showing how AI strengthens margins, improves cash flow, and stabilizes capital efficiency. By positioning technology programs as enablers of shareholder value, they are earning influence in boardrooms that once focused primarily on customer-facing functions.

Supply Chain Securitization: Pricing Risk and Resilience

Resilience is beginning to carry a market price. Financial instruments such as freight futures and insurance-linked securities now let companies hedge logistics and disruption risks. This financialization of resilience is drawing capital toward the most fragile points in global supply

networks and creating a shared vocabulary between supply chain and finance leaders. Companies that blend physical and financial strategies will transform resilience from a cost of doing business into a measurable source of value.

The Redistribution of China's Manufacturing Might

China is not losing manufacturing power; it is redistributing it. Capital, equipment, and management talent are moving into Southeast Asia, India, and Mexico, often under Chinese ownership or strategic influence. This "China-outside-China" network gives the illusion of diversification while maintaining deep ties to Chinese industrial ecosystems. Visibility into beneficial ownership and control structures, not just location or cost, is now a critical part of due diligence and risk management.

The End of Cheap Scale: Efficiency in a New Era

The assumption that volume automatically produces efficiency no longer holds. The plateau of globalization, rising energy costs, and new environmental and political constraints are redefining what scale means. Leading firms are expanding their definition of value to include cost, resilience, sustainability, and trust. They are developing new financial models that codify these trade-offs and are aligning the C-suite around metrics that reward balance instead of sheer volume.

The Reshoring Mirage: Closer Isn't Always Better

Reshoring remains politically appealing but economically uneven. Many projects promise capacity and jobs that never materialize, proving that proximity alone does not guarantee resilience. The strongest programs treat reshoring as one element in a diversified network strategy, pairing local production with digital visibility, supplier development, and robust performance management. Real advantage will come from discipline in design and execution rather than geographic symbolism.

The Great Regulatory Whiplash

Regulation is accelerating and diverging at the same time. Climate disclosure, data sovereignty, and trade rules are changing rapidly, forcing compliance to become a real-time capability instead of an annual exercise. Leading organizations are embedding regulatory intelligence within operations, using technology to monitor rules, adjust systems, and update contracts as policies evolve. Competitive speed will increasingly depend on how quickly companies can adapt to policy changes.

Global Business and Macroeconomic Trends for 2026

The global economy remained resilient amid tariff escalations in 2025. In 2026, trade barriers, fiscal constraints, and geopolitical tensions will continue to weigh on global confidence and test that resilience. Growth will remain uneven, with emerging markets showing stronger momentum.

The following analysis outlines the major macroeconomic forces set to define 2026, each with significant implications for businesses worldwide.

Inflation

Uneven Decline Across Regions Amid Risks

Global inflation is projected to fall from 5.8% in 2024 to 4.2% in 2025, and further to 3.7% in 2026, according to the International Monetary Fund's October 2025 World Economic Outlook report.[1] This would bring it closer to historical norms prior to the pandemic.

Inflation will vary across countries, remaining above target in the U.S. but lower in other major economies. Inflationary pressures may re-emerge, as the slowdown in price growth has flattened in several economies, driven by higher goods and services costs.

In the U.S., inflation is expected to average 2.7% in 2025 and ease to 2.4% in 2026 with upside risks, as companies start passing tariff-related costs onto consumers. Stockpiling ahead of tariff hikes pushed the U.S. import tariff rate to nearly 19.5%, the highest since 1933. Inflation will likely remain above the Fed's 2% target.[2]

In the U.K., inflation is expected to stay elevated at 3.4% in 2025 due to higher food prices, labor costs, and national insurance contributions. It is expected to ease to 2.5% in 2026 as temporary inflation drivers fade, wage growth moderates and the labor market cools. Inflation in the Euro Area is expected to stay at 2.1% in 2025, slightly above the European Central Bank's (ECB) 2% target, and ease to 1.9% in 2026.

In Asia, India's inflation is expected to decline to 2.8% in 2025, supported by stable food prices, easing essential commodity prices, and retail inflation slipping to an eight-year low. China is battling deflation, with inflation projected at 0% in 2025 due to persistent weakness in the property sector and trade tensions. Japan's inflation is expected to remain high at 3.3% in 2025 and ease to 2.1% in 2026. Australia's inflation is projected to slip to 2.6% in 2025 but rise in 2026 to 3%.

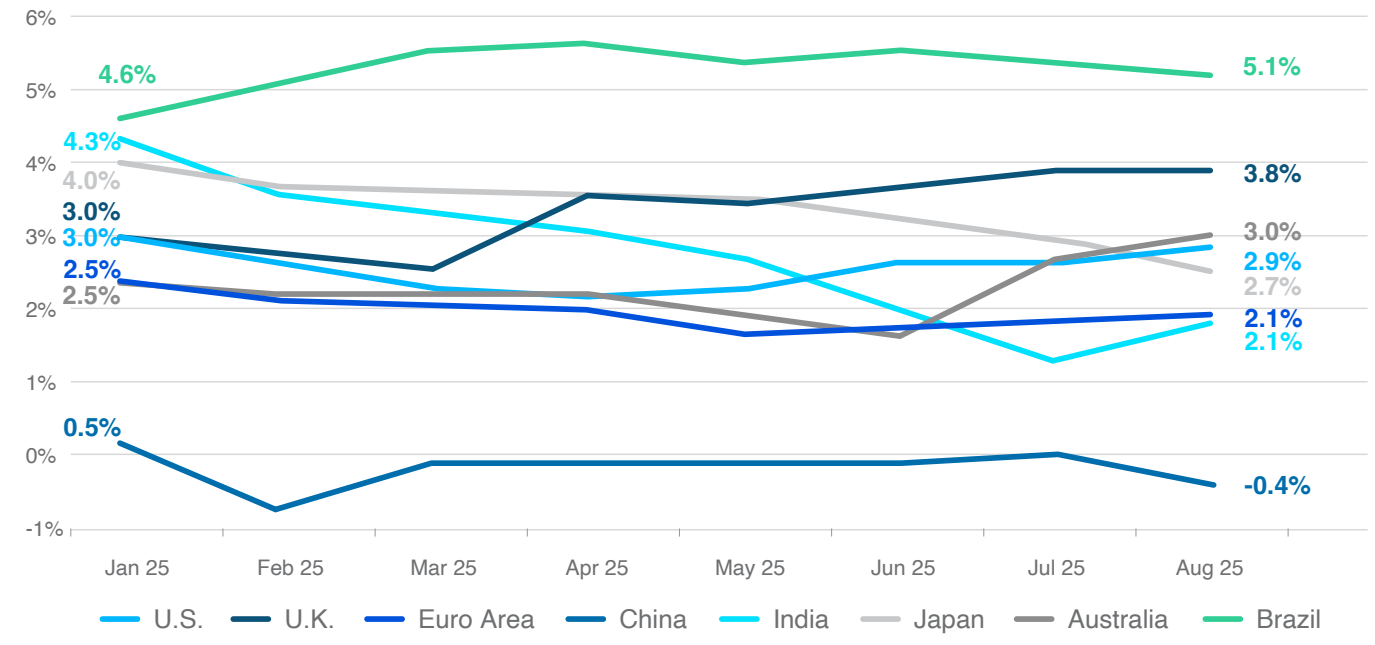
In Latin America, inflation is expected to decline from 16.6% to 7.6% in 2025 and further to 5% in 2026. Brazil's inflation is projected to touch 5.2% in 2025, above the 3% target.

Inflation Trends: Annual Percentage Change (Historic and Projected)

			Projected		
Country/Regional Classification	**2023**	**2024**	**2025**	**2026**	**2027**
Global	6.7	5.8	4.2	3.7	3.4
Advanced Economies	4.6	2.6	2.5	2.2	2.1
U.S.	4.1	3.0	2.7	2.4	2.2
U.K.	7.3	2.5	3.4	2.5	2.0
Euro Area	5.4	2.4	2.1	1.9	2.1
Japan	3.3	2.7	3.3	2.1	2.0
Australia	5.6	3.2	2.6	3.0	2.6
New Zealand	5.7	2.9	2.7	2.1	2.0
Emerging and Developing Asia	2.4	1.9	1.3	2.1	2.4
ASEAN-5	3.5	2.0	1.4	2.3	2.2
China	0.2	0.2	0.0	0.7	1.4
India	5.4	4.6	2.8	4.0	4.0
Middle East and Central Asia	15.4	14.0	10.9	9.5	8.3
Latin America and the Caribbean	14.8	16.6	7.6	5.0	3.8
Sub-Saharan Africa	19.4	20.3	13.1	10.9	8.9

Sources: Trading Economics, World Economic Outlook, Oct 2025, IMF

Inflation Trends 2025: Monthly Percentage Change



Source: Trading Economics, World Economic Outlook, Oct 2025, IMF

Key Lookouts for 2026

1

Tariffs and Trade Wars

If tariffs and trade wars intensify, it will reverse the gradual decline in headline inflation, leading to higher consumer prices worldwide.

2

Geopolitical Tensions

Short-term spikes in energy and commodity prices driven by geopolitical tensions will push producer and consumer inflation higher.

3

Interest Rates

Uncertainty around the pace of rate cuts could reignite inflation if done too soon or dampen growth if delayed, affecting global price stability.

GDP

A Slowdown on the Horizon

Global GDP growth is anticipated to slow from 3.3% in 2024 to 3.2% in 2025 and 3.1% in 2026, according to the IMF report. In early 2025, GDP growth was fueled as businesses stockpiled inventory ahead of new tariffs, but that temporary boost is expected to fade in 2026. Higher tariffs will continue to impact global growth, trade, investment, and broader economic activity.

The U.S. economy is forecast to slow from 2.8% in 2024 to 2.0% in 2025 and remain flat at 2.1% in 2026. Robust consumer spending, lower imports, and rising investment in AI supported strong growth in the second quarter of 2025. However, the combination of trade barriers, policy uncertainty, and lower growth in both the labor force and employment are likely to constrain momentum in 2026.

The U.K. is set for a modest recovery, with GDP growth forecast at 1.3% in both 2025 and 2026, up from 1.1% in 2024. But persistent inflation — the highest among G7 nations — and rising national debt (around 90% of GDP) are likely to hamper the pace.[3] In the Euro Area, growth is projected to edge up from 0.9% in 2024 to 1.2% in 2025 and then ease slightly to 1.1% in 2026, reflecting a gradual recovery in domestic demand.

Among emerging economies, China's GDP is forecast to slow from 5% in 2024 to 4.8% in 2025 and 4.2% in 2026 owing to the ongoing real estate crisis and trade escalations with the U.S. Conversely, India is expected to sustain strong GDP growth of 6.6% in 2025, easing to 6.2% in 2026. The outlook is supported by recent goods and services tax (GST) reforms, a favorable monsoon, and stable inflation.

Australia's economy is expected to grow 1.8% in 2025 and 2.1% in 2026, slightly ahead of New Zealand, where growth is estimated at 0.8% and 2.2% in 2025 and 2026, respectively.

Across Latin America and the Caribbean, regional GDP is projected to remain stable at 2.4% in 2025, falling marginally to 2.3% in 2026. Regional GDP is being buoyed by a strong outlook for Mexico, which is expected to grow at 1.0% in 2025 (a sharp 1.3-point upward revision from the IMF's April 2025 projection), supported by resilient exports and nearshoring ties with the U.S.[4] Brazil's 2025 outlook has also improved to 2.4%, though it's expected to drop to 1.9% in 2026, weighed down by the effect of U.S. tariffs on key exports.

GDP Growth: Annual Percentage Change (Historic and Projected)

			Projected		
Country/Regional Classification	**2023**	**2024**	**2025**	**2026**	**2027**
Global	3.5	3.3	3.2	3.1	3.2
Advanced Economies	1.7	1.8	1.6	1.6	1.7
U.S.	2.9	2.8	2.0	2.1	2.1
U.K.	0.4	1.1	1.3	1.3	1.5
Euro Area	0.4	0.9	1.2	1.1	1.4
Japan	1.2	0.1	1.1	0.6	0.6
Australia	2.1	1.0	1.8	2.1	2.2
New Zealand	1.8	-0.6	0.8	2.2	2.4
Emerging and Developing Asia	6.1	5.3	5.2	4.7	4.8
ASEAN-5	4.1	4.6	4.2	4.1	4.3
China	5.4	5.0	4.8	4.2	4.2
India	9.2	6.5	6.6	6.2	6.4
Middle East and Central Asia	2.6	2.6	3.5	3.8	3.8
Latin America and the Caribbean	2.4	2.4	2.4	2.3	2.6
Sub-Saharan Africa	3.7	4.1	4.1	4.4	4.5

Source: World Economic Outlook, Oct 2025, IMF

Key Lookouts for 2026

1

Delayed Tariff Impact
Tariffs and trade restrictions will take full effect gradually in 2026, disrupting supply chains, trade flows, and investment decisions across regions.

2

Policy Uncertainty
Policy unpredictability, such as in the U.S.-China relationship and Europe, could dampen business confidence and slow capital flows.

3

Global Debt
Rising public debt in advanced and emerging economies could limit governments' ability to support growth or respond to economic shocks.

4

Sectoral Shifts and Regional Divergence
Manufacturing and tech exports may face trade headwinds, while commodity-exporting emerging markets could gain from greater demand and prices.

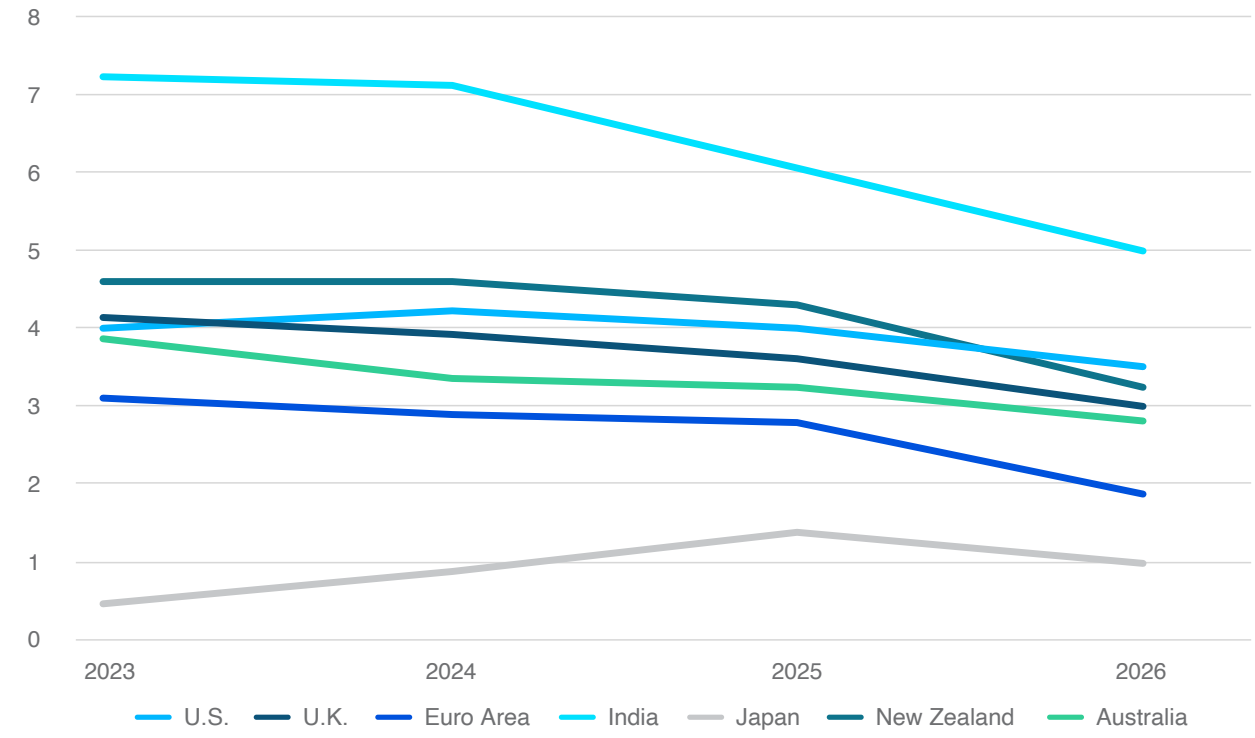
Interest Rates

Gradual Easing To Continue

After multiple rounds of rate cuts in 2025, major central banks are expected to maintain an easing bias through 2026, as inflation largely stabilizes and growth remains subdued. The U.S. Federal Reserve is expected to continue a cautious path of gradual reductions, balancing the need to sustain growth against lingering inflation risks and tighter credit conditions. In Europe, the ECB may adopt a more supportive stance to bolster demand, while the Bank of England is likely to proceed more slowly, constrained by persistent domestic inflation.

In Asia, China and India are expected to continue gradual rate adjustments to sustain growth, while Japan maintains low rates amid currency pressures. Australia and New Zealand will likely hold or make minor reductions to support household spending and investment, as inflation falls back within target ranges. Across most emerging markets, monetary policy remains moderately accommodative, balancing weaker global demand against efforts to stabilize currencies and attract investment.

Long-Term Interest Annual Rates: Trends and Forecast



Sources: OECD, Trading Economics

Employment

Unemployment Low, but Momentum Fading

The global employment market in 2025 was shaped by technological advancements, economic uncertainties, and demographic shifts. Looking ahead, labor markets will contend with tightening immigration policies, geopolitical volatility, and the accelerating impact of AI on workforce structures.

In the U.S., unemployment is expected to increase from 4% in 2024 to 4.2% in 2025. Changes to the immigration policy are unlikely to meaningfully alter short-term labor dynamics, as lower hiring reflects broader economic conditions rather than labor shortages. Entry-level candidates are facing a tougher job market, partly as AI reshapes workforce needs.[5]

In the U.K., unemployment rose from 4.3% in 2024 to 4.7% in 2025 and is expected to stay at 4.7% through 2026 as the labor market weakens with wage growth constraints and national insurance hikes slowing hiring. In the Euro Area, unemployment is expected to stay steady at 6.4% from 2024 to 2025, with a slight decrease to 6.3% in 2026.

China's unemployment is expected to be stable at 5.1% through 2025 and 2026, while India is forecast to remain at 4.9%. At 2.6%, Japan is expected to maintain very low unemployment through 2026.

Australia's unemployment rate will remain at 4.2% in 2025 but could rise marginally to 4.3% in 2026. New Zealand continues to face a tight labor market, with unemployment expected to ease slightly to 5.1% in 2026 from 5.2% in 2025 as economic conditions improve.

Within LatAm, Brazil's unemployment rate is expected to hit 7.1% in 2025 and rise to 7.3% in 2026. In Mexico, it's projected to rise from 2.7% in 2024 to 2.9% in 2025, and further to 3.1% in 2026.[6]

Unemployment Rate Trends: Annual Percentage Change (Historic and Projected)

			Projected		
Country/Regional Classification	**2023**	**2024**	**2025**	**2026**	**2027**
Advanced Economies	4.4	4.6	4.7	4.7	4.6
U.S.	3.6	4.0	4.2	4.1	4.0
U.K.	4.1	4.3	4.7	4.7	4.6
Euro Area	6.6	6.4	6.4	6.3	6.2
Australia	3.7	4.0	4.2	4.3	4.3
New Zealand	3.8	4.8	5.2	5.1	4.5
Other Advanced Economies (Excluding G7 and Euro Area	3.3	3.5	3.7	3.7	3.6

Source: World Economic Outlook, Oct 2025, IMF

Key Lookouts for 2026

Energy

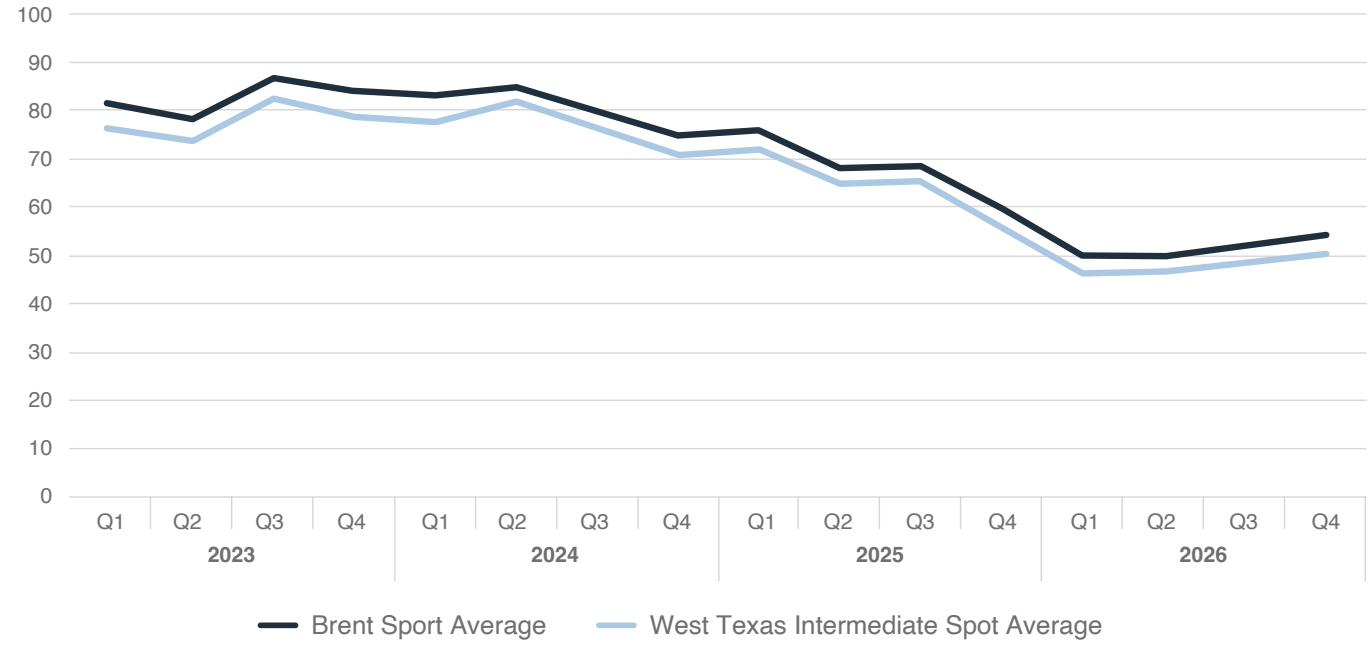
Oil Oversupply Persists, Nuclear Energy Sees Resurgence

Global oil prices averaged $80/bbl in 2024 but declined and are forecast to average over 16% lower at around $67/bbl in 2025. The key drivers for this included OPEC+ easing output cuts, record-high non-OPEC+ supply, large inventory builds, and weak demand.[7] China's strategic inventory builds have quietly lifted demand, partially offsetting downward price pressures in 2025.[8]

As per forecasts by the Energy Information Administration (EIA), oil prices will continue their decline and reach $52/bbl in 2026. Global oil inventories are expected to rise by an average of 2.1 million barrels per day (b/d) in 2026, up from an annual average increase of 1.9 million b/d in 2025.[9] While global consumption is set to increase by 720,000 b/d in 2026, mainly from non-OECD countries, new supply and excess capacity will likely keep the market oversupplied and prices under pressure in 2026.

Industrial expansion, data center growth, and the need for low-carbon baseloads are fueling demand for nuclear energy. The International Energy Agency (IEA) expects global nuclear generation to hit a record high by the end of 2025 and grow another 2%-3% in 2026, supported by the restart of several reactors in Japan, new projects in APAC and Europe, and strong output from the U.S. and France.[10] The IEA projects nuclear output to grow by 25-30 GW through 2026, led primarily by APAC, particularly China.[11] However, the sector is exposed to risks from project delays, uranium supply constraints and financing challenges, creating a stable to tight supply outlook for 2026.

Crude Oil Prices (USD Per Barrel)



Source: EIA

Key Lookouts for 2026

1. **Geopolitical Disruptions**
Escalating conflicts could impact oil supply, challenging current price decline forecasts.

2. **Adjustments to OPEC+ Production**
Any unexpected production cuts or stricter quota compliance could tighten oil inventories and reverse the downward price trend.

3. **Recovery in Demand**
Stronger-than-expected rebound in economic activities in China and the emerging economies can increase oil consumption and offset any sharp decrease in prices.

4. **Uranium Supply Constraints**
A widening uranium supply deficit (~130 million pounds produced vs. ~180 million pounds demand) can affect reactor fuel availability and slow nuclear energy growth.

Eight Leadership Themes for 2026

1. Governance: The Real Innovation in the Agentic Revolution

AI has been caught in a seemingly never-ending hype vs. bubble debate throughout 2025. Amid the competition to settle which crystal ball was more accurate, it became clear that autonomous software agents would soon play a key role in procurement and supply chain functions.

In 2026, autonomous software agents will no longer be a curiosity reserved for digital pioneers. They are becoming legitimate participants in procurement and supply chain operations, quietly executing bounded tasks such as sourcing routine materials, generating supplier quotes, and managing low-value purchase orders. Their rise is not a triumph of hype but the result of incremental learning. AI agents thrive in simple, data-rich decision flows that follow clear rules and can be easily monitored for performance. These systems are beginning to mature and will prompt leaders to shift focus from how to create and deploy them to how to review and provide oversight on them.

The Power and Peril of Autonomy

A continual army of vendors and in-house teams will be developing agents in 2026. Impressed by the remarkable capabilities of AI, they will create some compelling agents that harness repetition, scale, and speed. For example, agents can manage sourcing bids, and even hold multiple events simultaneously. They can scan bids and identify errors and outliers much faster and more consistently than humans. They can use rules and logic to do negotiations and make decisions, often in seconds.

Agents will also make mistakes. They can oversimplify things. They might incorrectly balance price and non-price attributes. They might, so to speak, miss the forest for the trees.

There will be a temptation to overlook some of this in favor of gains from efficiency and the novelty of using new tools. Procurement and supply chain leaders must start managing these agents, ensuring there is a continued focus on both automation advantages and oversight.

Delegated Judgment Requires Close Oversight

AI is powered by large-scale language and decision models. Agents introduce a form of delegated judgment that allows for significant advantages in scale and consistency. As this technical capability is applied to supply chain ecosystem data (across supplier data, contracts, pricing, bids, D&B profiles, etc.), it creates a runway for agents to act end-to-end with minimal or no human involvement. As these capabilities expand, old-fashioned ideas of control and governance become equally important. Agents must be paired with control steps, regular reporting, transparent ways of working, KPI reviews, audits, and other classic process governance practices.

Governance mechanisms such as explainability dashboards, audit trails, and “kill switch” controls have advanced far enough to make AI risk tolerable. The environment is finally a balance between technical feasibility and managerial confidence.

Early evidence of this balance is already emerging across industries. AI-driven sourcing bots now execute limited tenders for standardized components and feed results into human-led category reviews. Retailers are experimenting with demand-sensing agents that adjust replenishment orders daily based on live sales data. Financial institutions deploy AI assistants that triage third-party risk alerts prior to human validation. These examples share the same pattern: autonomy confined to bounded domains with defined performance metrics.

Measured Steps Toward Agentic Automation

As counterintuitive as it may seem, leaders are not the first ones racing ahead to adopt agents and agentic automation. They are slightly behind the fast starters and fast fail-ers. They are spending more time to be methodical, selecting the right areas for exploration and setting pragmatic boundaries. Many have a preference for areas where agents can recommend but not decide, or where humans can validate. Crucially, they are building controls to maintain transparency and traceability, taking extra steps to link the agentic solutions to existing checkpoints (such as price lists, approved suppliers, compliance standards).

AI & Governance

82%

of businesses surveyed say AI risks are actively accelerating their governance modernization timelines

75%

of respondents say AI exposes the limitations of legacy governance processes

37%

more time is being dedicated by businesses to manage AI-related risk compared to 12 months ago

*Survey conducted of 1,250 governance-focused IT decision-makers at companies with more than $100 million in annual revenue in Europe and North America

Source: 2025 AI-Ready Governance Report, OneTrust

Key Takeaway

In 2026, autonomous agents will become a practical feature of procurement and supply chain management. Success will depend less on smarter algorithms and more on creating the governance architecture that ensures machines act responsibly. The real test of leadership will lie not in how many tasks are automated but in how wisely autonomy is allocated, tracked, and governed.

2. Culture of AI: The Missing Half of Digital Transformation

Most enterprises now own sophisticated AI tools, but few have learned to use them well. What will distinguish leading companies in 2026 is not their technology stack but their culture: the literacy, curiosity, and judgment that enable people at every level to make sense of these deeply powerful new systems and tools.

The single most important differentiator that converts AI investment into a real advantage is prioritizing its cultural adaptation and integration. This means creating user comfort and fluency, encouraging experimentation at all levels, and redefining norms around how humans and machines are expected to interact and make decisions, within an integrated system.

The Gap Between Capability and Culture

In procurement and supply chain work, where even small mistakes can echo across entire ecosystems, it's culture not code that will determine whether AI enhances performance or becomes the new 'metaverse' failure.

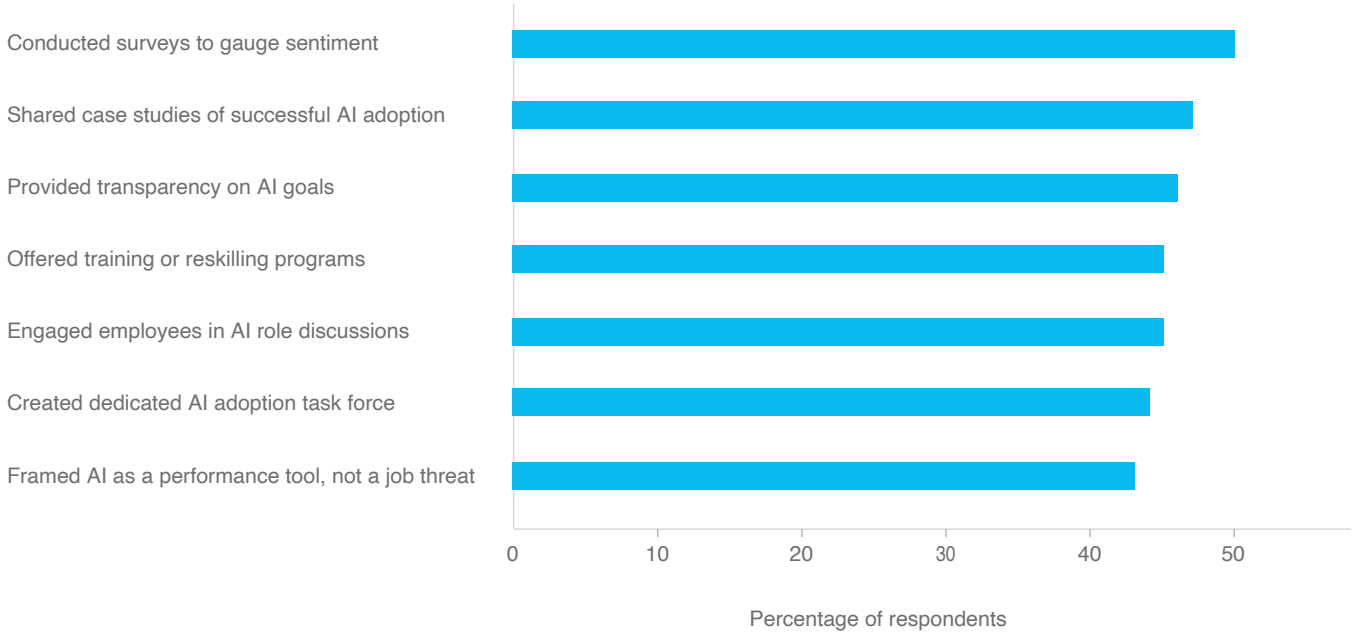
It can be challenging to distill how businesses build capability through technology development, but it's safe to say that many leaders believe capabilities naturally follow prudent investments. They assume that carefully scrutinizing capex spending and selecting the right deployment partners will let them reap the benefits of the new competencies. The AI curve has been so fast that many companies now face what analysts call algorithmic apathy: Employees ignore new tools, build small-scale, check-the-box automation pilots, or accept AI output without judgment, controls, or oversight. Trust and adaptation are far behind the technical capabilities of new AI tools. This is a cultural problem, not a technical one.

Laying the Foundations of an AI Culture

The last few years have been a stark and sometimes painful reminder that procurement and supply chain management is as much an art as it is a science. Forecasting, supplier evaluation, and logistics planning, for example, all rely on imperfect and context-dependent data and individual judgment. Perfect data, clear parameters, and predictive processes are conditions that are rarely present. How companies synthesize their ways of working and general business practices is a big part of their culture, and it often isn't codified.

For AI to replicate this nuance, organizations must build a culture of AI. Three elements provide the foundation for firms to successfully build this.

How Firms Are Addressing Employee Concerns About AI Adoption



Source: A GEP-sponsored Economist Impact report, How Far Will AI Agents Go?
Survey conducted between January-March 2025 of over 400 executives in the U.S. and Europe.

Support for AI literacy

Leading organizations have recognized that AI literacy is a basic competence and not a specialized qualification. It is not for the 'computer nerds' or the 'university new joiners' but rather a top-to-bottom competency as important as communication or analytical skills. CPOs and CSCOs should expect and insist that every category manager, logistics analyst, and supplier-relationship lead understands how models are trained, what data bias looks like, and when to escalate decisions.

Update RACIs and Rules of Engagement

The introduction of new AI tools often creates ambiguity about who does what. It can distort accountability for errors or sub-optimal choices. It may aggravate office politics or create unexpected competition. Decision clarity is essential. RACI and other process management tools remain useful in 2026.

Succeed or Fail – Both Are Good

It will take time, perhaps a long time, before organizations truly feel comfortable working with AI tools. Senior leadership can shorten this curve immensely by treating AI as a safe zone for experimentation. A test-and-learn culture is the risk mindset for leaders to adopt. Leaders who share both successes and failures will help shift the dialogue around AI from being a faraway, inconsistent or abstract concept to one that makes an impact on everyday operations.

In 2026, an AI-literate culture will separate firms that create sustainable advantage from those merely digitizing old ways of working.

Key Takeaway

The technology gap is shrinking, but the cultural gap is widening. Companies that master both will treat AI as an organizational capability rather than a set of tools. Those that neglect culture will find themselves surrounded by data and flashy assets but devoid of actionable insights.

3. The Newest Procurement and Supply Chain Skillset: Yelling Louder

Procurement and supply chain are often overlooked in the great corporate battle for capital funding. Sales and marketing seem to get all the flashy new toys and outsized budgets. It's often easier to rally senior leadership around a potential sales uplift than around an initiative to reduce exposure to risk. Many executive compensation schemes even indirectly reinforce this.

Persuasion Is a Strategic Skill

Procurement and supply chain leaders, despite being armed with data that when used can directly influence cost, risk, and capital efficiency, often find themselves waiting at the end of the queue. The imbalance is not about technology anymore: it's about voice.

In 2026, chief procurement and supply chain officers will have to advocate more forcefully for their digital priorities and learn to express their ambitions in the language that boards understand best — the language of shareholder value.

The most successful CPOs and CSCOs are discovering that persuasion is a strategic capability. They have learned to "yell louder" not by raising the volume of their appeals but by using financial, quantifiable metrics to back them. They present AI initiatives in terms of return on invested capital, margin stability, and risk reduction rather than just system features.

53%

of CPOs say budget constraints are the biggest obstacle to deploying AI solutions

Source: Ardent Partners Procurement Metrics That Matter 2025

Tactics That Are Getting Results

- **Take back ownership from IT.** Too many procurement and supply chain organizations are stuck waiting for IT to supply them with an AI roadmap. AI should not be owned by a central team; effective leaders are empowering functions to build their own vision and roadmap.

- **Partner with finance.** The financial impact of AI investment shouldn't be a guesstimate. Partner early and fully with finance to show the income statement or balance sheet impact of these investments. Often, the cash and margin advantages are just as important and interesting as the technical elegance of the solution. Tell the AI story "the finance way."

- **Describe the outcomes, not the experiment.** While peer comparisons may not (yet) be a meaningful measure, identifying and focusing on the financial metrics that stand to improve will help clearly articulate the impact of the procurement and supply chain agenda.

The payoff for getting this right is significant. Companies that treat supply chain AI as an investment in financial, results-focused performance rather than a technology experiment are well placed to lead in both outcomes and sustainable practices.

Key Takeaway

Leaders who can tell the story in the language of finance will not need to shout to be heard. They will be heard because they are finally speaking the same language as the people who decide where capital flows.

4. Supply Chain Securitization: Pricing Risk and Resilience

For decades, companies treated supply chain resilience as a cost of doing business. Extra inventory, backup suppliers, and emergency freight were the price of business continuity. That logic is changing. Financial markets are beginning to price supply risk directly, allowing firms to transfer specific exposures, much like they hedge fuel or currency.

A new marketplace for resilience is emerging — one in which disruptions can be quantified, traded, and mitigated through financial instruments.

From Physical Buffers to Financial Shields

The concept is not entirely new. Airlines have long hedged jet fuel, and manufacturers routinely hedge metals or currencies. What is different now is the range of what can be hedged. Freight futures tied to indices such as the Freightos Baltic Index or the Baltic Exchange allow companies to lock in container and air-cargo rates months in advance. Insurance-linked securities enable investors to take on operational shocks such as port closures, natural disasters, and regional logistics disruptions, in exchange for higher yields. These instruments convert operational volatility into a tradable financial risk.

Their rise is a response to years of turbulence that exposed the fragility of global logistics. Traditional responses such as building plants, stockpiling inventory, or developing duplicate supply lines offered protection but required vast capital. Financial instruments offer a different path. They provide speed and liquidity, allowing firms to buy coverage against low-probability, high-impact events instead of rebuilding entire networks to guard against them.

Procurement and Finance Converge

This evolution is reshaping how procurement, supply chain, and finance work together. Instead of negotiating for larger budgets to fund buffer stock, supply chain leaders can now speak the language of risk-adjusted returns. A CFO who once viewed resilience purely as a cost can now evaluate it as a strategic investment. These functions are beginning to share metrics, governance, and accountability.

Leading companies are creating “resilience desks,” i.e. joint teams that manage both physical and financial hedges. These teams operate under shared limits, much like treasury departments manage exposure to currencies or commodities. When freight costs surge, a hedge tied to the relevant index offsets the expense. When capacity tightens, the desk can activate emergency logistics at pre-agreed rates. The goal is to smoothen volatility rather than trying to eliminate it altogether.

How Markets Can Strengthen Resilience

Financializing supply risk protects margins while also attracting capital to the weak points in global supply chains. When investors can price disruption, they can also finance its prevention, funding backup infrastructure, warehousing capacity, or alternative trade routes in exchange for steady returns. Over time, this could make resilience a shared endeavor between operators and capital markets, much as renewable energy finance transformed power generation.

The data and transparency that underpin securitization also improve operations. As indices mature and investors demand standardized, detailed reporting, companies gain sharper visibility into their cost drivers and vulnerabilities. Pricing and trading risk forces organizations to understand it more deeply.

The Governance Challenge

Turning resilience into a financial function introduces new risks. Hedging a freight lane is not the same as buying insurance. The difference between an index and a company's actual exposure, known as basis risk, can produce surprises if misunderstood. Governance must evolve alongside these instruments. Clear trading authority, segregation of duties, daily mark-to-market reporting, and independent audits are essential. Without those controls, securitization could amplify rather than reduce exposure.

Boards are watching closely. Some remain cautious, concerned that thin markets or speculative behavior could distort priorities. Others see the opportunity to professionalize resilience management by applying the same rigor used in traditional financial hedging. Early adopters show that modest, disciplined participation can stabilize budgets and improve predictability without drifting into speculation.

A Language for Resilience

Supply chain securitization will not replace operational excellence, and no financial instrument can reopen a closed port. But it can buy time and predictability. The most sophisticated firms will combine financial and physical strategies, buffering what cannot be hedged and hedging what cannot be buffered. The language of resilience will become more analytical, measured in exposure, coverage, and variance rather than anecdotes about shortages or delays.

Key Takeaway

In 2026, leadership in procurement and supply chain will include understanding markets that price risk and knowing when to transfer it. Once resilience carries a market value, ignoring it becomes an unmanaged exposure. Companies that combine operational agility with financial acumen will not just weather disruption better but also define how resilience is measured and valued.

5. The Redistribution of China's Manufacturing Might

The breakdown of the massive U.S.-China trade relationship, exacerbated by tariffs and trade crises, has been accompanied by a slight reduction in China's overall growth rate. However, the prognosticators trying to portend the decline of China are missing the point. China is not losing its manufacturing strength; it is redistributing it. What looks like diversification away from China is, in many cases, the extension of its industrial ecosystem into new geographies.

The Illusion of Decline

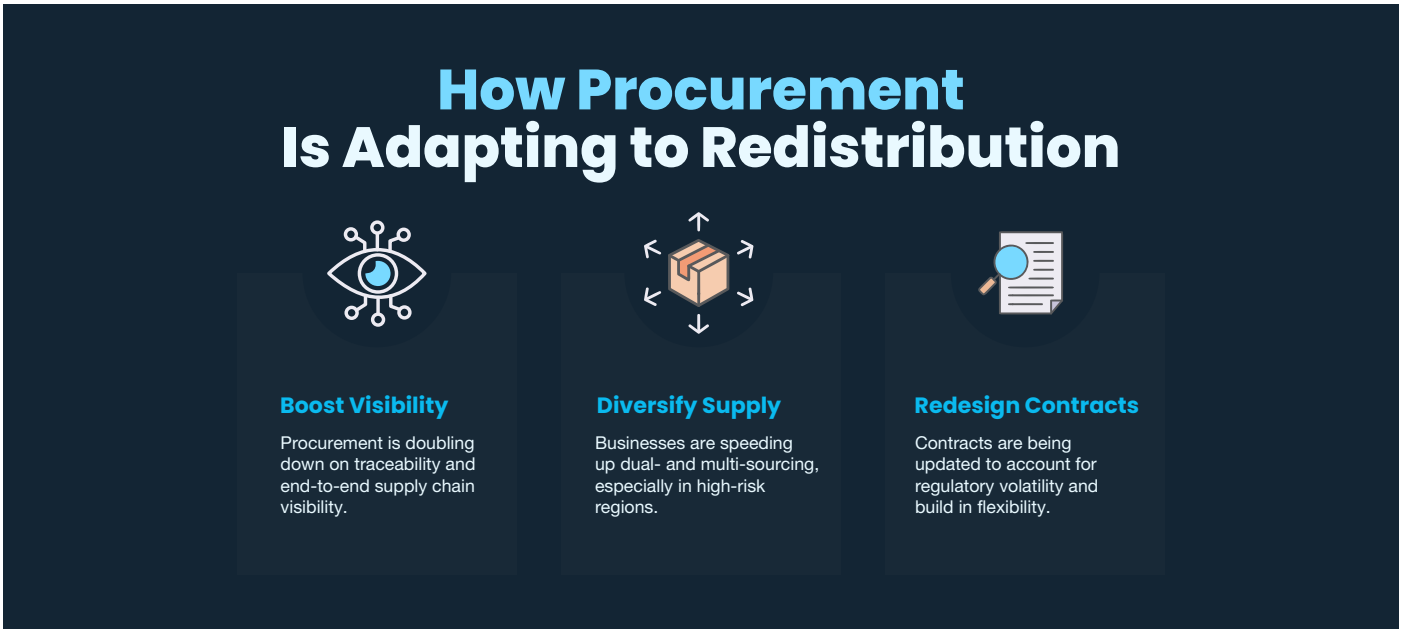
In 2026, the "China-outside-China" supply chain network will be a top consideration for procurement and supply chain teams for two key reasons.

First, the emphasis on country of origin has led to a regrettably more opaque supply system. To avoid penalizing trade barriers, industries targeted in the trade war are moving to Southeast Asia, Mexico, and other locations, using a wide range of tactics — from light touch assembly or repacking to investing in local operations and creating new inventory hubs. While it appears that the manufacturing activity has shifted from China to another region, it remains, essentially China-outside-China. This result, largely an economic reaction to political action, has frustrated procurement and supply chain leaders who have spent years enhancing supply chain resiliency, traceability and transparency.

Second, there is very little evidence that manufacturing capabilities are changing. China remains a formidable manufacturer and an economic powerhouse. Numerous markets are ready to take advantage of this vast production machine.

Responding to a Redistributed Supply Chain

Procurement and supply chain leaders need to learn to face this evolution pragmatically. This redistribution of manufacturing capacity has advantages as well as risks. The expansion of capacity across emerging economies adds flexibility and shortens lead times, but it makes visibility and compliance much more complicated. Governments are beginning to scrutinize beneficial ownership, not just country of origin, signaling the goal posts are still moving.



Leading procurement organizations are responding in three ways. First, they are doubling down on efforts that boost traceability and supply chain visibility. Just like in the pandemic era, this information remains all-powerful. Second, they are firming up plans for dual-sourcing or multi-sourcing, particularly in geographies caught in political crosshairs. Third, they are redesigning contracts to factor in regulatory volatility and maintain flexibility as conditions change.

The shift of manufacturing power outward from China is not a story of decline but of adaptation. For global procurement and supply chain leaders, the task is to look beyond where goods are made to who ultimately controls the means of production.

Key Takeaway

In 2026, resilience will depend less on how many borders a shipment crosses and more on how deeply a company understands the network of ownership behind every component it buys.

6. The End of Cheap Scale: Efficiency in a New Era

For decades, size was a near-certain path to success. The larger the plant, the lower the cost; the more volume a company pushed through its network, the safer its economics seemed. Procurement teams were rewarded for negotiating rock-bottom prices, operations teams for driving utilization, and finance for proving that bigger always meant cheaper.

That logic doesn't hold true anymore. Accelerated by the uneven economic recovery that followed the pandemic, this era of low-cost scale has largely ended. The global economy has grown more complex, more regulated, and far less predictable. Cheap scale, the kind that could be achieved by chasing the lowest unit cost and assuming stability everywhere, no longer exists.

The Widening Circle of Expectations

Over the past decade, the role of procurement and supply chain leaders has expanded dramatically. Delivering the lowest landed cost remains essential, but now it sits alongside mandates for sustainability, transparency, security, ethical sourcing, and resilience. Each new expectation adds distortion to what used to be a straightforward equation. A decision that once required only a cost model and a supplier comparison now also includes an emissions impact forecast, a human rights assessment, or a geopolitical risk score. Efficiency remains paramount, but it is just one dimension of value.

At the same time, the external context has shifted. The long boom of globalization has plateaued. Trade, which once grew faster than GDP, now grows more slowly. New trade blocs and tariff regimes are fragmenting markets. Energy prices are volatile, and carbon accounting has become a part of financial disclosure. Political nationalism is rising in every region.

The New Face of Efficiency

None of this means size is obsolete. But in this environment, while scale still produces leverage, it also increases exposure to multiple dimensions. The new measure of scale is not just how much a network produces but also how quickly it adapts when conditions change.

Boards are already starting to value flexibility and adaptability. A supply network that avoids outages without unplanned overruns delivers steadier margins and more credible guidance. Resilience, once dismissed as insurance, has become a component of valuation.

How Leadership Must Evolve

Procurement and supply chain leaders need to stop measuring success by the old rules and instead redefine value for the new environment. The next generation of leaders will do three things differently.

1. Reframe Value: They will move from a single-minded focus on "lowest cost" to a portfolio view of value. Cost, carbon, resilience, and trust all matter, and the right balance varies by product and market. The goal is not to abandon cost discipline but to integrate it into a broader definition of performance.

2. Codify the New Economics: Once value is defined, it must be measurable. Leaders are building internal models that assign prices to risk and externalities (carbon costs, disruption probabilities, reputational exposure) so that trade-offs become explicit and comparable.

3. Align the C-Suite: Governance must ensure these broader trade-offs are shared decisions, not footnotes. CFOs, COOs, and Chief Sustainability Officers should evaluate options through the same lens, using common metrics. When incentives reward only cost reduction, resilience will always lose the budget argument. Alignment on metrics enables "balanced value" to become real.

Key Takeaway

Responsibility and resilience share the stage with efficiency. Scale still matters, but the cheap part of scale belongs to a bygone era. The next generation of leaders will pursue advantage through balance: big enough to be efficient, smart enough to adapt, and transparent enough to earn trust.

7. The Reshoring Mirage: Closer Isn't Always Better

Reshoring has powerful political appeal in 2026. What politician doesn't want to be the one who brings a new factory or production asset to an underserved area, injecting jobs and positivity into that community? Factory announcements mean good news is on the way and that the economic model has been validated. But for procurement and supply chain leaders, announcements alone offer limited proof of progress. The real question is how much of this activity actually translates into operational results.

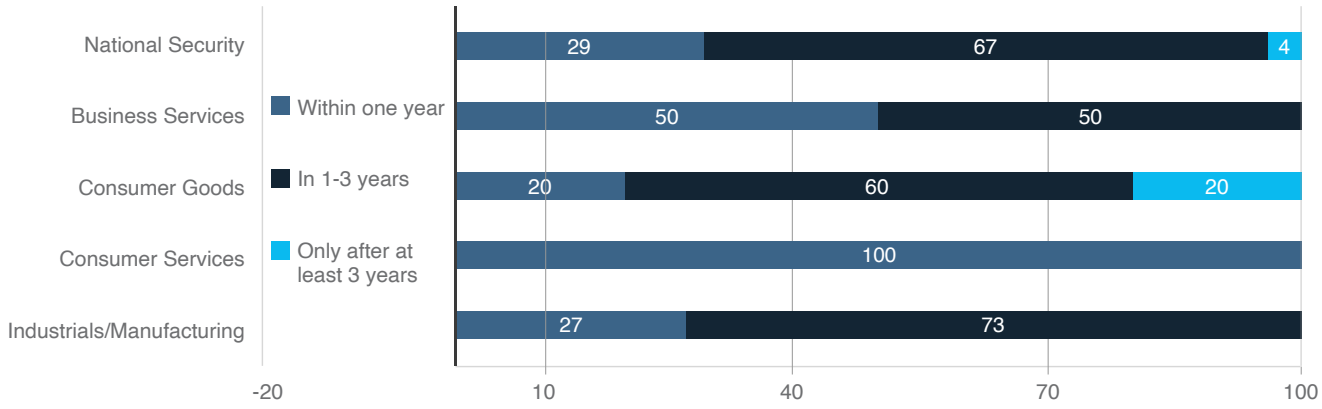
Reshoring's Reality Check

In practice, reshoring is, at best, an uneven story. The economics of reshoring are often misleading, and procurement and supply chain leaders must remain vigilant before being satisfied. There are many high-profile examples, such as Foxconn's failed and underwhelming expansion in the U.S., that illustrate there is an "Instagram vs. reality" problem for reshoring. Some projects will succeed on their merits, but many will fall short because capacity, skills and supplier ecosystems do not materialize at the pace that press releases imply.

The greater risk for 2026 is not that companies will move nothing, but that they will move too much of the wrong thing, only to later discover that proximity without new capability does not meaningfully increase supply chain resilience. Resilience is the real measure of success in 2026, as it has been since the pandemic. Reshoring isn't a panacea that improves resilience. Geography alone does not minimize risk. New locations still need stable supply flows. They need to be operated and maintained at high standards.

Reshoring to the U.S. (Within the Next 1-3 Years)

If you expect a shift away from China, how soon will production move? (% share of respondents)



Source: Battle of the Titans: Reshoring vs. Friendshoring, June 2025, Bank of America Institute & BofA Global Research.
Based on survey of 36 analysts, based on 8 countries covering 1,029 companies that represent over US$ 38 triliion of market cap.

Building Resilience Through Design

This does not mean firms should avoid reshoring. Procurement and supply chain leaders should evaluate reshoring as one instrument in a broader portfolio. Leaders are enhancing multi-source programs and are holding more inventory closer to their end customers. Following lessons from the pandemic, they have better governance to integrate customer, supply and finance inputs into a common decision-making process.

Leaders are finding that reshoring is most compelling when it strengthens resilience rather than simply cuts costs. Moves that improve traceability, supplier and input data, and operational control deliver far more lasting value than political headlines.

The reshoring story will not end soon and is unlikely to be definitively understood in 2026. Some companies will create lasting advantage by bringing the right activities closer to demand, while others will add cost into their systems without adding control or improved resilience. The difference will come down to design and discipline. The winners will choose carefully what to move, pair physical decisions with digital control and measure success by improved stability and service rather than by press coverage.

Key Takeaway

Reshoring attracts great headlines, but it doesn't always build resilience in supply chains. True resilience will come from design and discipline. That is, moving the right activities closer to demand, supported by digital control, data transparency, and governance that integrate supply, customer, and financial priorities.

8. The Great Regulatory Whiplash

For most of modern business history, supply chains operated on the assumption that rules changed slowly. Compliance was a calendar event: a checklist to complete once a year, review, and file away. That rhythm has vanished, and regulation is now a moving target, tightening in some regions, easing in others, and multiplying almost everywhere. Executives describe the effect as "regulatory whiplash," a constant lurch between expansion and rollback that demands agility rather than static compliance programs.

A Faster Regulatory Tempo

The new tempo began with sustainability. The EU moved first and furthest, introducing sweeping disclosure requirements such as the Corporate Sustainability Reporting Directive, and experimenting with digital product passports. As political resistance grew, the regulations narrowed or were delayed. In the U.S., climate risk reporting rules from the Securities and Exchange Commission were issued, stayed, and relitigated within months. Across Asia-Pacific, governments advanced in a different direction, tightening export controls, data-sovereignty rules, and local-content mandates.

Procurement and supply chain leaders who once monitored a handful of standards are now navigating a thicket of overlapping and sometimes contradictory obligations.

This volatility has structural causes. Environmental and social policies intersect with national security and industrial policy goals. Governments use regulations to not only enforce ethics but also steer investment and protect domestic industry. As priorities shift with each election cycle, the rulebook keeps changing. Compliance has evolved from a periodic audit into an operating capability that must run continuously.

The Growing Strain

For procurement and supply chain teams, the result is relentless, seemingly endless complexity. A single bill of materials can trigger several disclosure regimes, each demanding unique data and documentation. Suppliers must demonstrate both carbon performance and labor-practice compliance while tracking export restrictions that change quarterly. Traditional compliance structures, like annual certifications and static supplier codes, can no longer keep pace. The rate of change forces legal, commercial, and technical disciplines to work together in ways that were rare only a few years ago.

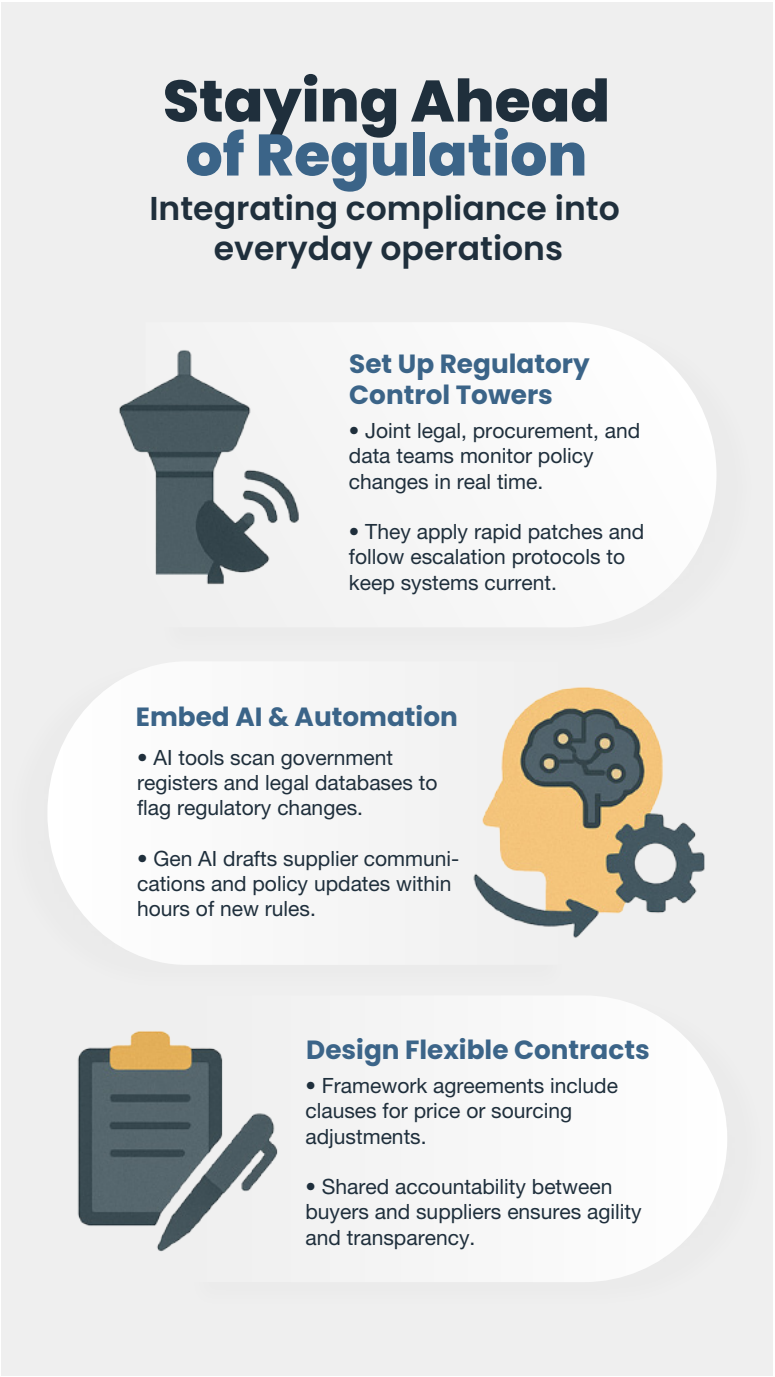
And getting it wrong can be costly. Delays in certification can hold up shipments, while a misclassified component can lead to fines or loss of market access. Over-compliance carries its own penalty. It means building elaborate processes to guard against every possible rule, diluting focus on the most material risks. The challenge is to design systems that are comprehensive yet nimble.

Turning Compliance Into Intelligence

Leading organizations are moving from compliance management to regulatory intelligence. They treat rules as a live dataset rather than a regulatory obligation and incorporate compliance into everyday operations.

Leaders are creating cross-functional "regulatory control towers." These governance teams combine legal experts, procurement specialists, and data engineers who monitor policy changes and update systems. Their operating model follows the lead of cybersecurity teams, with continuous monitoring, rapid patching, and escalation protocols.

Finally, leaders are embedding flexibility into contracts. Framework agreements now include clauses that allow price adjustments or sourcing changes when regulations shift. This approach protects both buyer and supplier from the cost of sudden policy changes and encourages open communication and information sharing about new or proposed requirements.



Agility as a Tech-Enabled Capability

Mastering regulatory agility delivers more than risk reduction. It creates competitive speed, and the company that adapts fastest usually wins. Analysts increasingly view strong compliance systems as a proxy for governance maturity and operational discipline, qualities that correlate with resilience and trust.

Automation will accelerate this shift. AI-assisted monitoring tools already scan government registers and legal databases to flag changes that affect specific products or regions. Generative systems can draft supplier communications or policy updates within hours of a new rule being announced. Human oversight remains essential, but technology is sharply reducing the lag between regulation and response.

The Road Ahead

The regulatory landscape will remain unsettled, with climate ambitions, geopolitical tensions, and social expectations pulling policy in conflicting directions. The lesson for executives is clear: stability has given way to constant change. Compliance can no longer be delegated down the hierarchy or confined to an annual report. It must operate continuously within the transaction flow, adapting to an evolving rulebook.

Key Takeaway

Companies that thrive will treat regulation not as background noise but as an early signal of market change. They will see agility in compliance as a form of strategic speed. In a world where the law itself can change by the quarter, the ability to adapt quickly is the next source of advantage.

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