

New-generation supply chain

Connecting the links to reach common goals

The three pillars of the new-gen supply chain: Agile, AI-powered, and sustainable

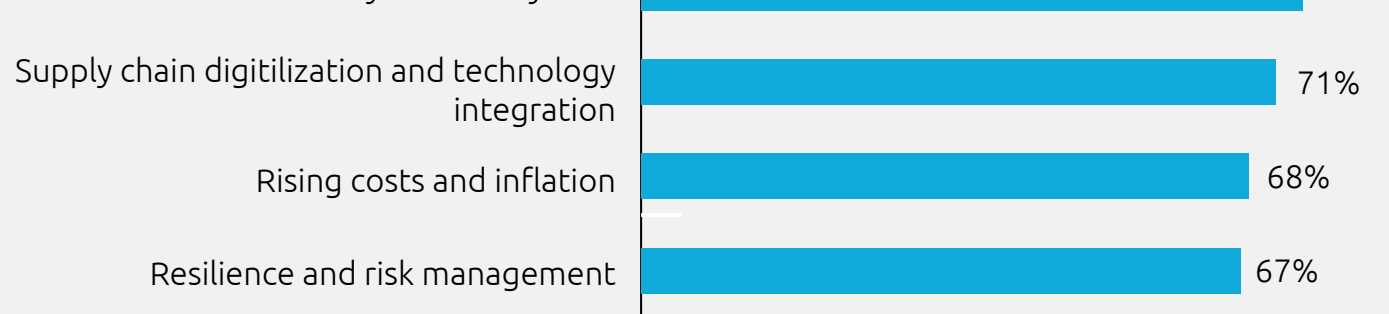
Over the past three years, organizations' supply chains have changed significantly - **72%** of executives agree with this in 2025, compared with **54%** in 2022

68% of organizations have established a clear vision and objectives for their supply chain in 2025, up from **35%** in 2022

Agility is the core of new-gen supply chain

Cybersecurity risks emerge as a major challenge for supply chain management, followed by supply chain digitalization and technology integration

Percentage of executives citing the below as key challenges for their organization's supply chain



Source: Capgemini Research Institute, New-generation supply chain survey, March–April 2025, N = 1,000 executives.

Cybersecurity gains urgency with supply chain digitalization

- **79%** of executives are very concerned about cybersecurity visibility of the supply chain

Rising costs and inflation make cost efficiency an imperative

- **66%** of executives agree that supply chain investments and costs are likely to increase in the next couple of years

Resilience and risk management are vital for operational continuity

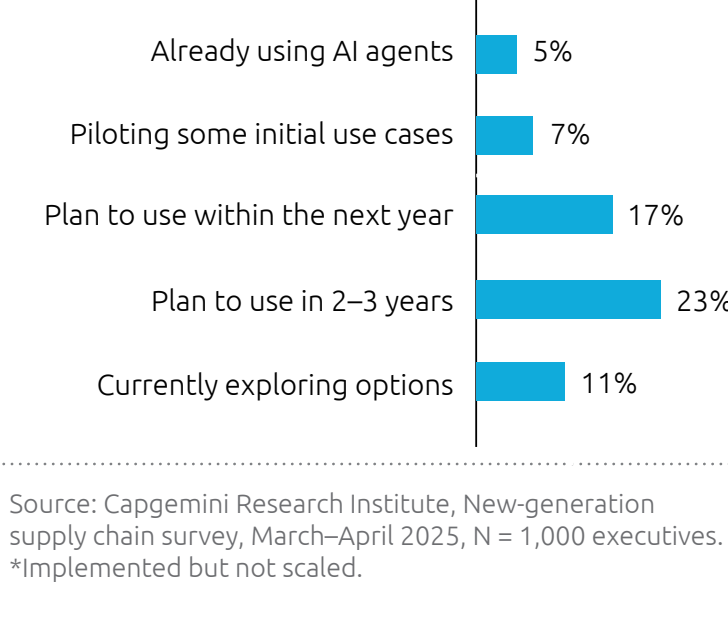
- **76%** of executives state that their organization currently focuses on managing supply chain risk, top risks being monitored are responsiveness/adaptability risks (42%) and in-bound logistics bottlenecks (41%)
- Geopolitical conflict is a major external supply chain disruptor
 - **41%** of executives state global conflict as the most significant disruptor (41%) of supply chain management, followed by tariffs (31%)
 - **64%** of executives cite 'supplier diversification ratio' as the top metric/KPI of supply chain resilience
- Tariffs:
 - **56%** of executives cite import/export tariffs as a major challenge to their organization's supply chain

Agentic AI is transforming new-gen supply chain

State of agentic AI implementation

- **66%** of organizations claim that agentic AI systems will take most supply chain decisions in the next three to five years
- **27%** of organizations have established a dedicated team for agentic AI
- **~ 10%** of organizations have already implemented multi-agent systems or are already using AI agents but not necessarily scaled, with 7% piloting initial use cases and 11% exploring options

Share of organizations at each AI agent maturity level

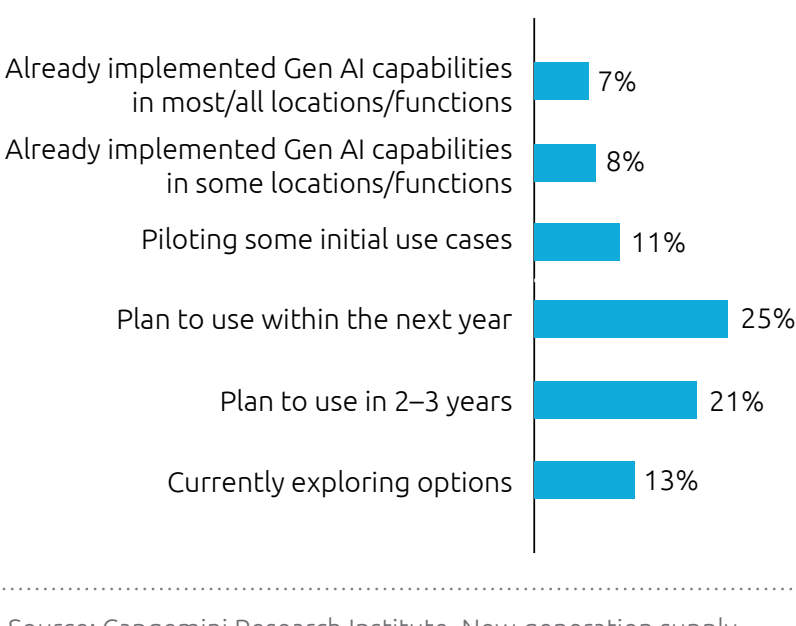


Source: Capgemini Research Institute, New-generation supply chain survey, March–April 2025, N = 1,000 executives. *Implemented but not scaled.

Adoption of Gen AI use cases in supply chain

- **15%** of organizations have already implemented Gen AI in some/most functions/locations within supply chain:

Percentage of organizations at various Gen AI maturity levels



Source: Capgemini Research Institute, New-generation supply chain survey, March–April 2025, N = 1,000 executives.

Organizations are reaping multiple benefits by using Gen AI in supply chain:

- **61%** of organizations state Gen AI helps predict demand fluctuations and optimize inventory levels

- **53%** of organizations state Gen AI helps detect anomalies and ensure quality control in the supply chain

- **51%** of organizations state Gen AI identifies and mitigates bottlenecks within the supply chain

- **51%** of organizations state Gen AI enhances assessment and management of supplier risks

Sustainable supply chain reinforces resilience

Sustainability drives long-term resilience and cost efficiency

76% of executives agree that sustainable practices drive cost efficiencies

71% of executives state sustainable practices are associated with business value

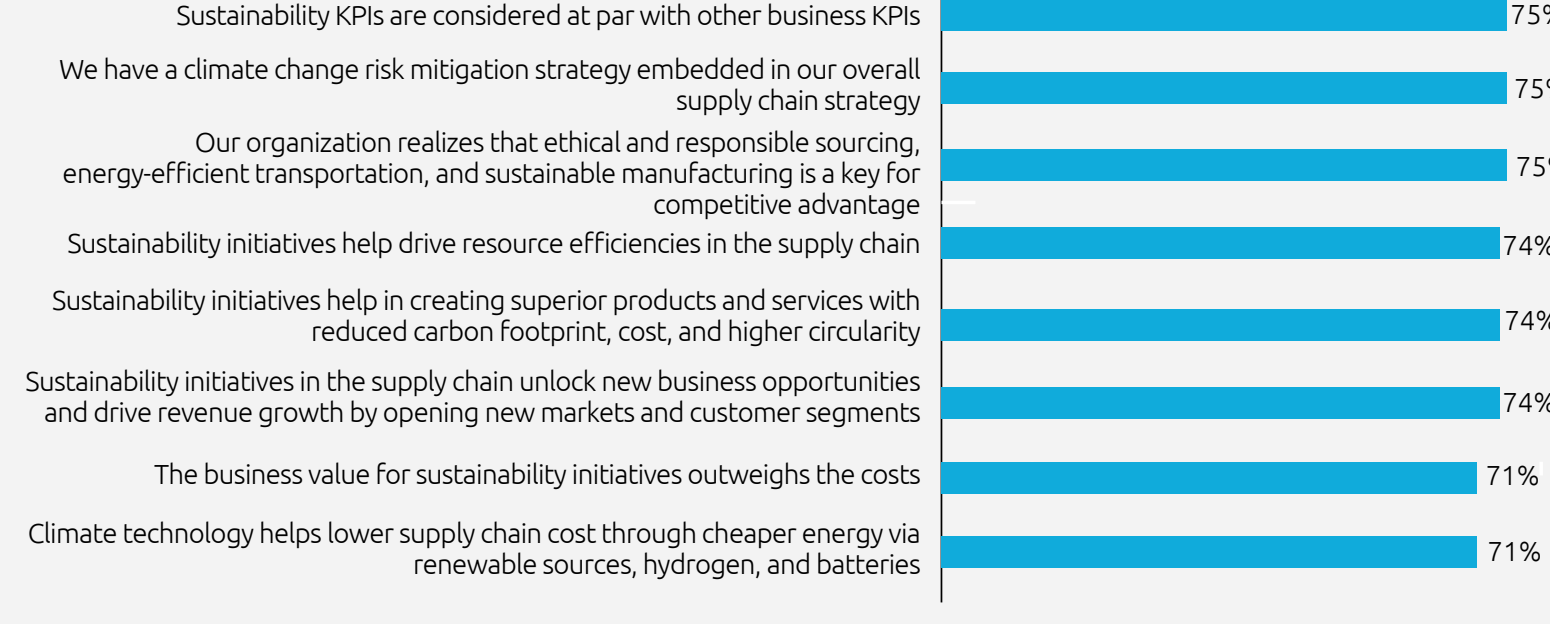
Sustainable supply chains add business value

78% of organizations consider sustainability leaders' inputs vital to areas such as network design, sourcing, and supplier selection

76% of organizations have a comprehensive supply chain sustainability strategy in place

Organizations recognize sustainable supply chain as a business value driver

Share of organizations agreeing with the following statements

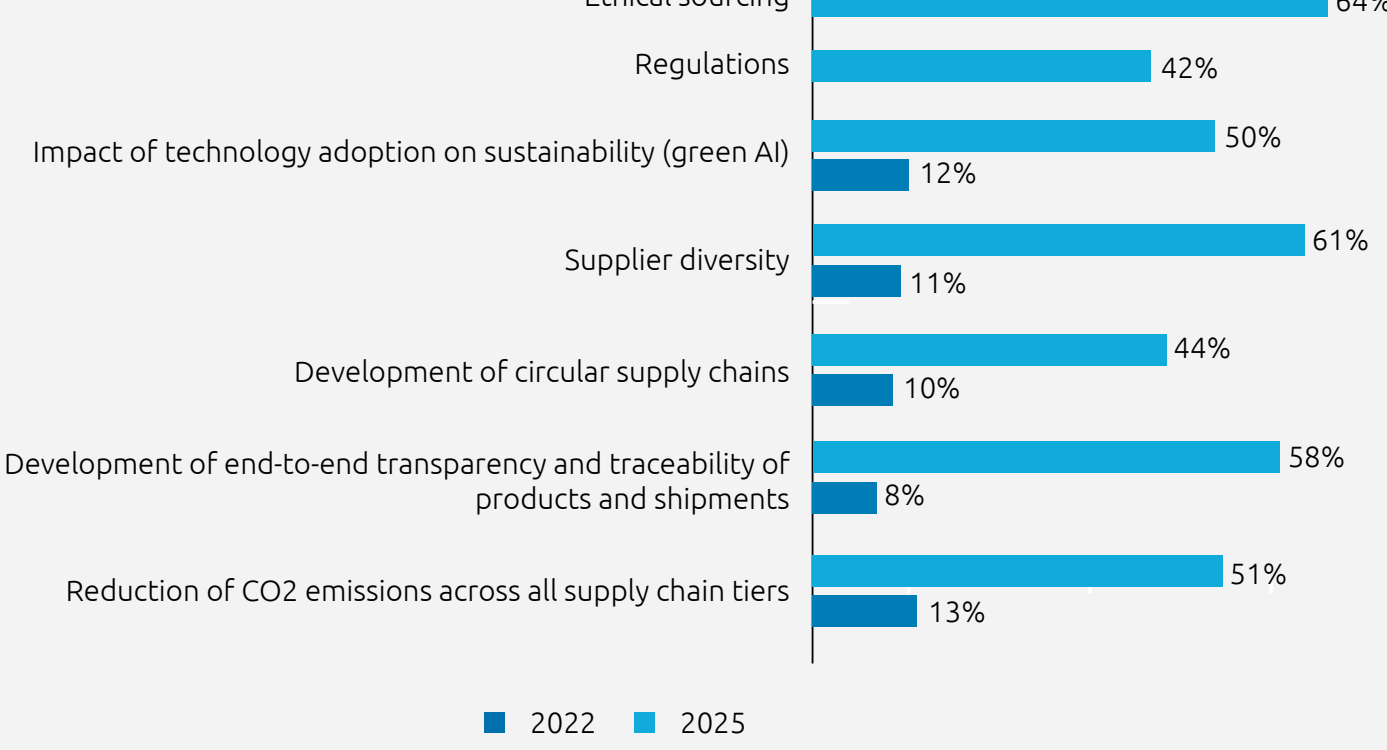


Source: Capgemini Research Institute, New-generation supply chain survey, March–April 2025, N = 1,000 executives.

There has been a dramatic improvement in organizational supply chain capabilities

Organizational capacity to handle supply chain trends has improved dramatically since 2022 through better platforms for planning and resource management, in the process marginally reducing the impact of these trends on the supply chain

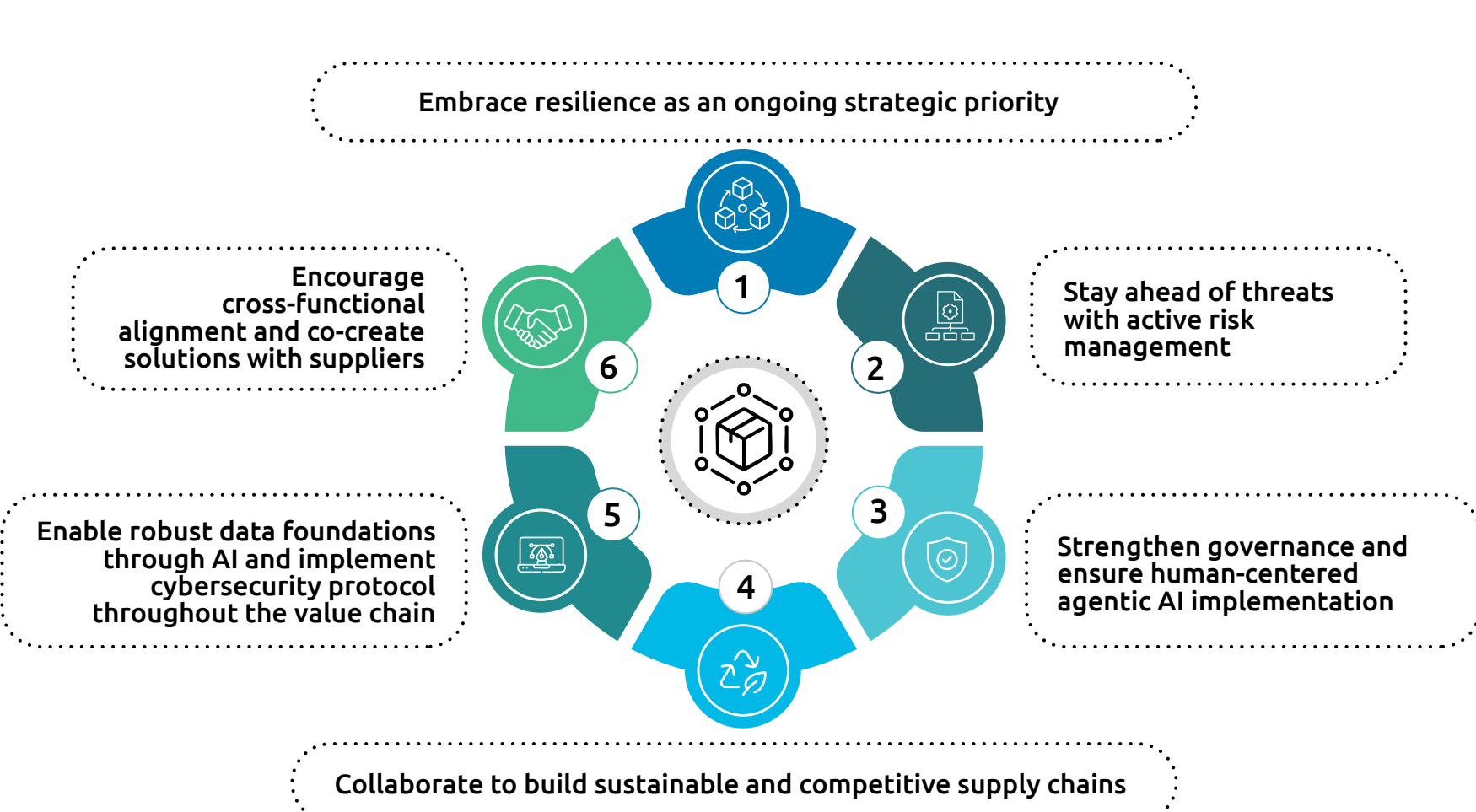
Organizations' ability to address these sustainability trends in their supply chains



Source: Capgemini Research Institute, New-generation supply chain survey, March–April 2025, N = 950 executives, Intelligent Supply Chain Research, August–September 2022, N = 950 executives. Please note that this data excludes Canada.

Recommendations for building a new-gen supply chain

Our research leads us to make a set of recommendations for organizations to build new-generation supply chain



Source: Capgemini Research Institute analysis.

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