Capgemini RESEARCH INSTITUTE

Resilient by design

Reinventing supply chains with human-agent operations

Make it real.

Supply chain is still top of agenda

Supply chain transformation is a priority

75% of organizations have changed their supply chains significantly over the past two years

66% of organizations align supply chain objectives with strategic priorities

Supply chain investment is on the upswing

Projected supply chain investment growth in the next 12-18 months, by industry



Agentic AI will redefine supply chain

AI agent adoption has increased over the past year

Percentage of organizations who have piloted or implemented AI agents in supply chain, by industry



56% of organizations agree that in the next 3–5 years, most business decisions in the supply chain will be taken by AI agents/agentic AI systems

Organizations are taking a realistic view of fully automated supply chains

Percentage of organizations who agree with the statement, by industry:
My organization's supply chain will be 100% fully automated and powered by AI agents/agentic AI within the next 3–5 years



Human oversight will remain essential

Human-in-the-loop remains critical

84% of organizations agree that humans must retain the authority to validate decisions made by AI agents and intervene when necessary

80% believe that trust in AI-driven supply chain decisions will depend on the ability of humans to review and intervene when needed

Certain organizations lag in readiness for AI agent implementation

55% of organizations are actively investing in foundational technologies required to enable AI agents at scale

41% are building capabilities to support agent-to-agent communication protocols within their technology ecosystem

Supply chain resilience is the north star

Geopolitics is a core supply chain issue

78% Geopolitical instability is a significant challenge impacting my organization's supply chain today

62% In light of recent geopolitical tensions, I am concerned about my organization's ability to maintain seamless supply chain operations

54% We can implement quick and cost-effective means to adjust to short-term disruptions/ fluctuations in our supply chain

Improving resilience is a key driver of transformation initiatives

Percentage of organizations who say that building resilience is the top priority for their supply chain, by industry

Supply chain sovereignty is a board-level issue

98% of organizations worldwide, regardless of country or industry, have discussed supply chain sovereignty with their boards

87% have or are formulating a supply chain sovereignty strategy

Percentage of organizations who have a supply chain sovereignty strategy, by industry

Laying the foundations for a resilient AI-powered supply chain

Source: Capgemini Research Institute, Supply chain survey, July 2026, N = 1,000 executives; New-generation supply chain survey, March–April 2025, N = 1,000 executives; Capgemini Research Institute analysis.

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