2026 Procurement Agenda and Key Issues Study Results

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PROCUREMENT EXECUTIVE ADVISORY

The Hackett Group®

About this study

BACKGROUND AND METHODOLOGY

The Hackett Group Procurement Advisory team conducted research in late 2025 for the 2026 installment of our annual Procurement Agenda and Key Issues Study. We asked procurement leaders at a global set of midsize and large enterprises about their strategic priorities and initiatives for the upcoming year, including:

- Essential companywide objectives, issues and risks for 2026
- Key trends that will have a transformational impact on the procurement agenda over the next five years
- 2026 key objectives and transformation plans for procurement teams
- Projected changes in procurement workloads, staffing levels, operating budgets and technology spending
- Technology deployment to enable procurement processes
- The use of AI-enabled technology to empower procurement capabilities

This report provides key insights into the following:

- Insights on top-of-mind companywide objectives, issues and risks
- 2026 procurement trends, priorities and resources
- Projected changes in cost savings for 2026, including key value levers
- Technology adoption, growth and value
- Artificial intelligence (AI) journey and value delivery

PROCUREMENT RESPONDENT PROFILE

86% of respondents are at director level or above

63% of respondents have revenue greater than $5B

55% of respondents are manufacturing companies

45% of respondents are services companies

66% of respondents are headquartered in North America

26% of respondents are headquartered in Europe

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

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Executive summary

2026 procurement agenda and key issues at a glance

Companywide outlook

72% Place high priority on enhancing customer satisfaction and experience.

50% Cite cybersecurity as a major concern for 2026.

Cost savings

45% Project higher levels of savings in 2026 compared to 2025.

35% Expect flat savings in 2026, which is a marked increase from 2025.

Workload, FTEs, operating budgets and technology investment

8.0% Increase in workload is expected in 2026, with falling FTEs and operating budgets.

6.1% Increase in technology spend is projected to close productivity and efficiency gaps.

2026 procurement priorities

1 & 2 **Ensuring supply continuity** and **improving cost reduction** are the top two priorities for 2026.

3 & 4 **Deploying AI-enabled technology** and **transforming the operating model** round out the top four.

Technology

71% Have adopted Gen AI (i.e., pilot or large-scale implementation).

56% Have deployed agentic AI (i.e., pilot or large-scale implementation).

AI journey and outlook

43% Are actively pursuing AI-enabled technology deployment.

>9% Improvements are reported for productivity increases (9.7%) and cycle-time savings (9.3%).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Executive summary

Essential companywide objectives, issues and risks for 2026	▪ **Strategic growth and innovation are top companywide priorities:** Organizations are placing a high priority on objectives such as increasing market penetration, improving market development, innovating products and services, and enhancing customer satisfaction and experience. These goals reflect a strong focus on growth, differentiation and delivering greater value to customers in 2026. ▪ **Cost leadership and talent retention remain critical:** Achieving cost leadership and improving employee development and retention are essential objectives. Companies are striving to optimize costs while investing in talent to ensure long-term competitiveness and operational excellence. ▪ **Major risks include economic, geopolitical and social factors:** The most significant risks for 2026 include economic downturns and recession, geopolitical tensions and trade wars, access to capital and competitive market alternatives, and the acquisition and retention of employees/talent. These risks require proactive management to safeguard organizational success.
2026 procurement trends, priorities and resources	▪ **Digital transformation and AI-driven procurement:** Procurement organizations are rapidly embracing digitalization and automation, with AI-enabled technologies set to transform all aspects of procurement. This includes autonomous sourcing, contract authoring and real-time data visibility to enable faster, smarter decision-making and operational efficiency. Agentic AI is expected to automate routine tasks and support strategic analysis, making procurement more agile and resilient. ▪ **Doing more with less:** Procurement's workload is predicted to increase by 8% in 2026, but with a small decrease in both headcount and operating budget. This creates both productivity and efficiency gaps, implying high hopes for procurement technology investments. Technology spend is anticipated to grow by an estimated 6.1% in 2026. ▪ **Forward-thinking teams are redesigning their operating models:** Due to the accelerated understanding of the importance of AI and, more importantly, the increasing understanding of its forthcoming disruptive impact, procurement teams need to revamp the procurement operating model through an AI lens that elevates value creation.
Projected cost savings and value levers	▪ **Savings expectations are less optimistic in 2026:** Procurement teams have lowered their expectations for purchase cost reduction and cost avoidance savings in 2026. For both types of savings, the level of participants forecasting decreasing savings levels has remained relatively stable. However, expectations for flat savings levels have increased – fewer contributors are projecting increasing savings levels. ▪ **Top five value levers:** The techniques expected to drive the greatest increase in savings and value realization in 2026 are supplier negotiation, strategic sourcing, category management, contract review and demand management.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Executive summary (cont.)

Technology adoption, growth and value	▪ **End-to-end core procurement technologies:** There is a high level of adoption with continued investment planned over the next three years, demonstrating the importance of technology enablement. Spend analytics, CLM and e-sourcing solutions are some of the key planned investment areas. ▪ **Supporting procurement technologies:** Adoption levels are strong for project pipeline and savings tracking, advanced analytics and supply risk management. Advanced analytics and supplier performance management solutions are key areas of planned investment. ▪ **AI-enabled technologies:** Gen AI, agentic AI and machine learning are the most widely deployed AI-enabled technologies. Strong deployment of both Gen AI and agentic AI technology is being reported, with a greater focus on pilots than on large-scale implementations. The level of planned investment in new technology is highest for Gen AI, agentic AI and predictive AI.
Artificial intelligence (AI) journey and value delivery	▪ **AI adoption is accelerating in procurement:** Organizations are rapidly integrating AI technologies into procurement processes. This adoption is a critical driver for transforming traditional workflows, enhancing visibility to transactions and data, and enabling smarter, data-driven decision-making. ▪ **AI delivers tangible value across multiple dimensions:** AI is not just a technology upgrade, but a source of measurable value. Key areas of impact include cost savings, process automation, risk mitigation and enhanced supplier management. AI is helping procurement teams deliver greater strategic value and unlock efficiencies. ▪ **Continuous AI maturity and capability building:** The AI journey is ongoing, with organizations currently focusing on building capabilities, upskilling teams and refining use cases. Success depends on aligning AI initiatives with business objectives and ensuring robust measurement of outcomes to demonstrate value delivery.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

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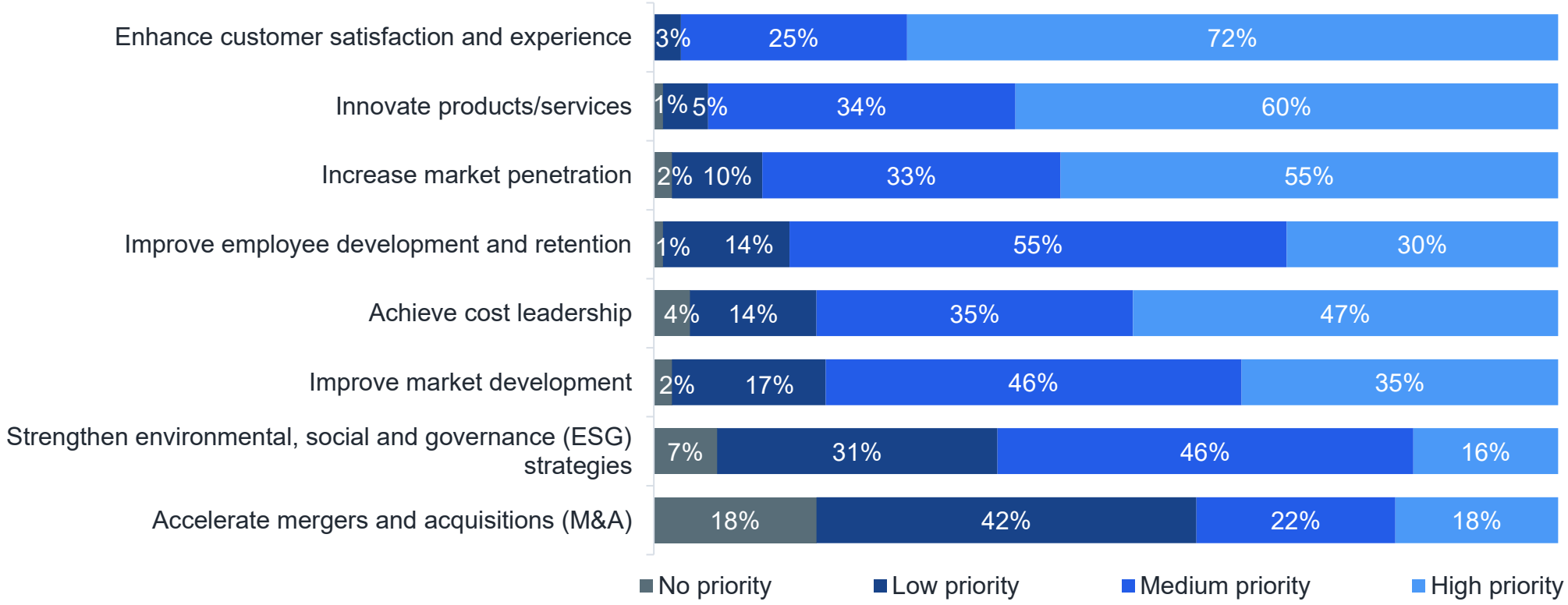
Essential companywide objectives, issues and risks for 2026

Companywide business objectives

The top three companywide business objectives focus on customer acquisition and satisfaction, followed closely by employee development and cost leadership. Procurement has a key role to play in enabling overall business objectives by harnessing the supply base to support product development, investing in developing highly capable procurement professionals and optimizing the cost of third-party goods and services.

IMPORTANCE OF EACH BUSINESS OBJECTIVE FOR YOUR ORGANIZATION IN 2026



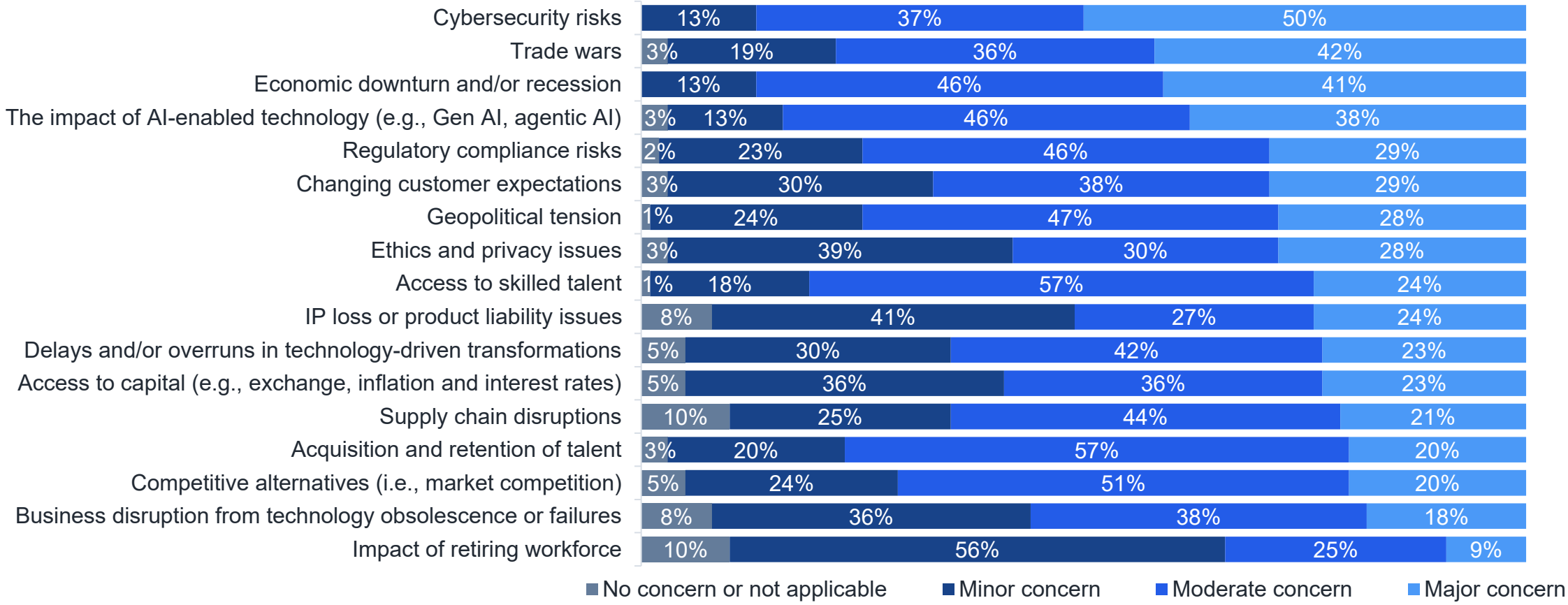
Q. Please indicate the importance of each business objective for your organization in 2026.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Companywide risks and concerns

The top risks and concerns for 2026 include cybersecurity, economic challenges (e.g., trade wars, economic downturns) and the impact of AI-enabled technology on businesses. While cybersecurity and economic downturns remain in relatively similar positions as last year, trade war concerns have been significantly elevated since last year's survey. AI-enabled technology was a new option for this year's study and features prominently as a companywide concern for organizations to address.

ISSUES AND RISKS OF ENTERPRISEWIDE CONCERN FOR 2026



Q. To what degree are the following issues and risks a concern for the organization's success in 2026?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

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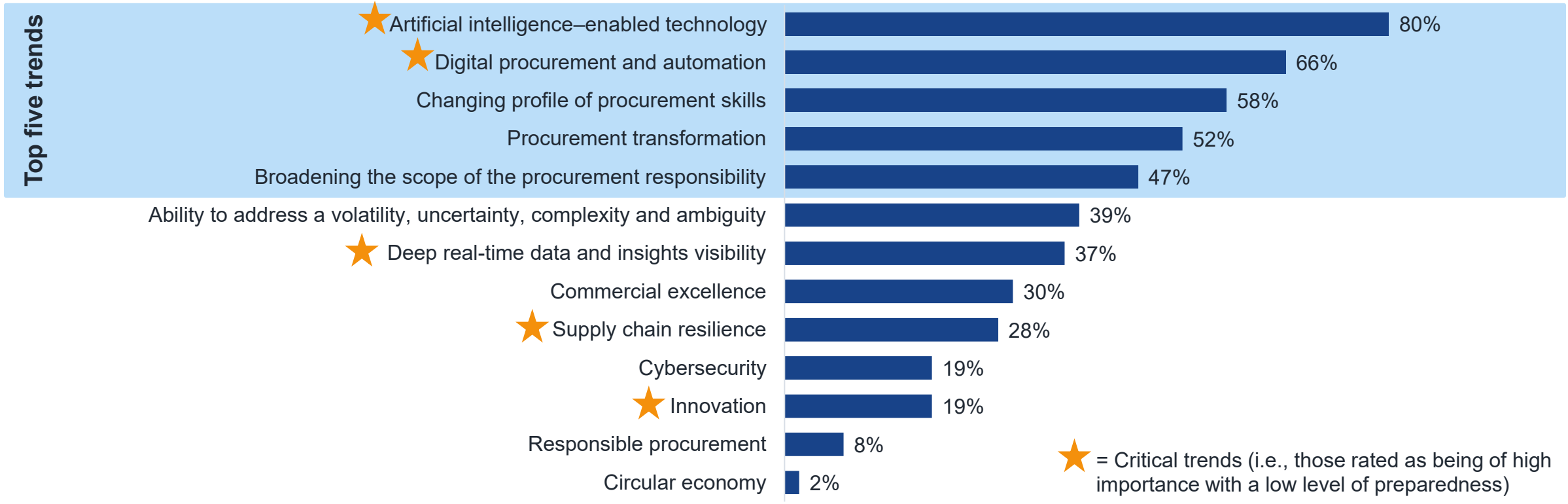
2026 procurement trends, priorities and resources

Procurement trends with a transformational impact

The factors expected to drive the greatest transformational impact on the way procurement teams perform their jobs over the next five years are AI-enabled technology (80%), digital procurement and automation (66%), the changing profile of procurement skills (58%), and procurement transformation (52%). AI-enabled technology is expected to deliver enhanced system functionality, enabling procurement organizations to empower teams to deliver a broader value proposition.

PROCUREMENT TRENDS WITH A TRANSFORMATIONAL IMPACT



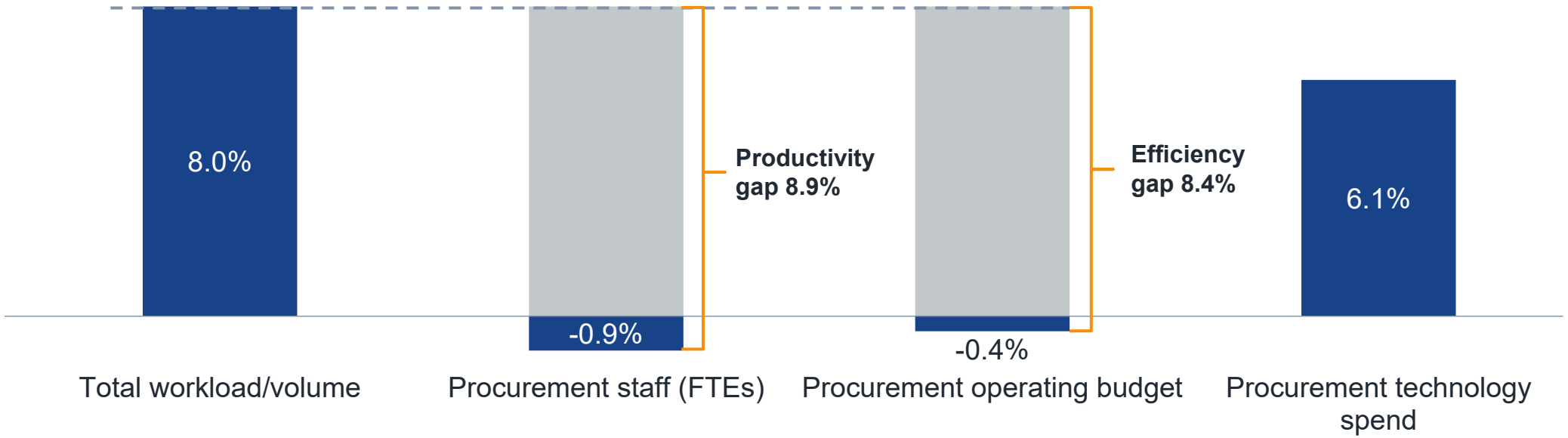
Q. Which key issues and challenges will have the greatest transformational impact on the way procurement performs its job over the next five years? (Please select 5 trends.)

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Procurement's workload is predicted to increase by 8% in 2026, but with a small decrease in both headcount and operating budget

Expectations indicate a productivity gap of 8.9% coupled with an efficiency gap of 8.4%, implying high hopes for procurement technology investments. Technology spend is anticipated to grow by an estimated 6.1% in an effort to close productivity and efficiency gaps. Projected technology spend is slightly higher than the 5.6% growth projected for 2025.

PROJECTED PERCENT CHANGE FROM 2025 TO 2026
FOR PROCUREMENT, STAFFING, BUDGET AND TECHNOLOGY SPEND



Q. What is the estimated expected percentage change in workload, staffing levels, operating budget and technology spend in the procurement function in 2026 compared to 2025?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

2026 top 10 priorities for procurement

1

ENSURE SUPPLY CONTINUITY

Supply continuity has moved to the top of the priority list after two years in second position. Supply issues remain top of mind for many teams due to ongoing geopolitical disruption and shifting trade relations. Supply continuity is critical for protecting revenue and profitability.

2

IMPROVE SPEND COST REDUCTION

Reducing the cost of supplier spend remains a core priority. Spend cost reduction has moved to second place after two years in first place, likely due to the elevated risk profile associated with supply continuity.

3

DEPLOY AI-ENABLED TECHNOLOGY

Deploying AI-enabled technology was added in the 2026 study and has entered the list in third position, highlighting the transformational impact that AI-enabled technology is starting to have on procurement teams.

4

TRANSFORM THE OPERATING MODEL

Transforming the operating model (e.g., process, technology, people) has moved down from third place in 2025. As teams consider factors such as the need to simplify, increasing business expectations and an AI-enabled future, the operating model should adapt to meet evolving requirements.

5

ACT AS A STRATEGIC ADVISOR TO THE BUSINESS

Expectations of procurement teams have increased as stakeholders seek support in areas such as supply risk management, digital transformation, and corporate environmental, social and governance (ESG) objectives. Having a "seat at the table" is a key enabler of effectiveness.

6

DIGITAL TRANSFORMATION AND MODERN LANDSCAPE

Digital transformation continues to be an essential enabler of a procurement organization's ability to do more with less through better intelligence and increased speed, customer-centricity and competitive advantage.

7

STRENGTHEN THIRD-PARTY RISK MANAGEMENT VISIBILITY AND CAPABILITY

The focus on third-party risk management remains as procurement teams have struggled to gain sufficient visibility to risk and capability to react quickly to the rapidly changing business environment over recent years.

8

IMPROVE PROCUREMENT AGILITY

Becoming an agile enterprise is important, but it requires developing agile behavior at the process level. Being able to pivot to help solve business challenges is critical to support new and evolving stakeholder objectives effectively and increase satisfaction levels.

9

IMPROVE ANALYTICS' AND INSIGHTS' CAPABILITIES

Procurement recognizes that success requires a data- and insight-driven approach. A critical enabler is providing reliable and forward-looking data and intelligence to end users, including capabilities such as cost modeling and projecting the impact of changing commercial conditions.

10

IMPROVE THE VELOCITY OF THE PROCUREMENT ORGANIZATION

Procurement teams that improve velocity/speed are better placed to drive competitive advantage, improve efficiency and reduce costs. Speeding up processes leads to faster product development, quicker response times to market changes and lower administrative overhead.

Q. Please select the top 10 procurement objectives for 2026. (Select up to 10.)
Q. Please rate the importance of the top 10 procurement objectives for 2026.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Trends in procurement priorities

Improving spend cost reduction and ensuring supply continuity have consistently featured in the top three priorities for procurement teams since 2022. Deploying AI-enabled technology was added in the 2026 study and entered the list in third position, highlighting the transformational impact that AI-enabled technology is starting to have on procurement teams.

2022	2023	2024	2025	2026
1 Reduce risk to ensure supply continuity	1 Ensure supply continuity	1 Improve spend cost reduction	1 Improve spend cost reduction	1 Ensure supply continuity
2 Improve spend cost reduction	2 Combat inflationary price increases	2 Ensure supply continuity	2 Ensure supply continuity	2 Improve spend cost reduction
3 Act as a strategic business advisor	3 Improve spend cost reduction	3 Combat inflationary price increases	3 Transform the operating model	3 Deploy AI-enabled technology NEW!
4 Corporate sustainability	4 Pursue digital transformation and modernize landscape	4 Act as a strategic business advisor	4 Combat inflationary price increases	4 Transform the operating model
5 Accelerate procurement digital transformation	5 Improve analytics' and insights' capabilities	5 Transform the operating model	5 Pursue digital transformation and modernize landscape	5 Act as a strategic business advisor

Q. Please select the top 10 procurement objectives for 2026. (Select up to 10.)
Q. Please rate the importance of the top 10 procurement objectives for 2026.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Procurement initiatives for 2026

The most popular planned transformation initiatives for procurement teams in 2026 include data analytics and AI-enabled technology. There is a clear focus on service design and delivery projects, which comprise six of the top 10 initiatives on the 2026 transformation agenda. AI-enabled technology has moved from eighth place in 2025 to second place in 2026, highlighting a greater focus on AI-enabled technology this year.

TOP 10 IMPROVEMENT INITIATIVES ON THE 2026 TRANSFORMATION AGENDA

1	Data analytics and reporting
2	AI-enabled technology (e.g., Gen AI, agentic AI)
3	Category management
4	Strategic sourcing
5	Talent management (i.e., acquisition, development, retention)
6	Supplier relationship management (SRM)
7	Strategic business partnerships
8	Contract management
9	Third-party risk management
10	Core procurement technology

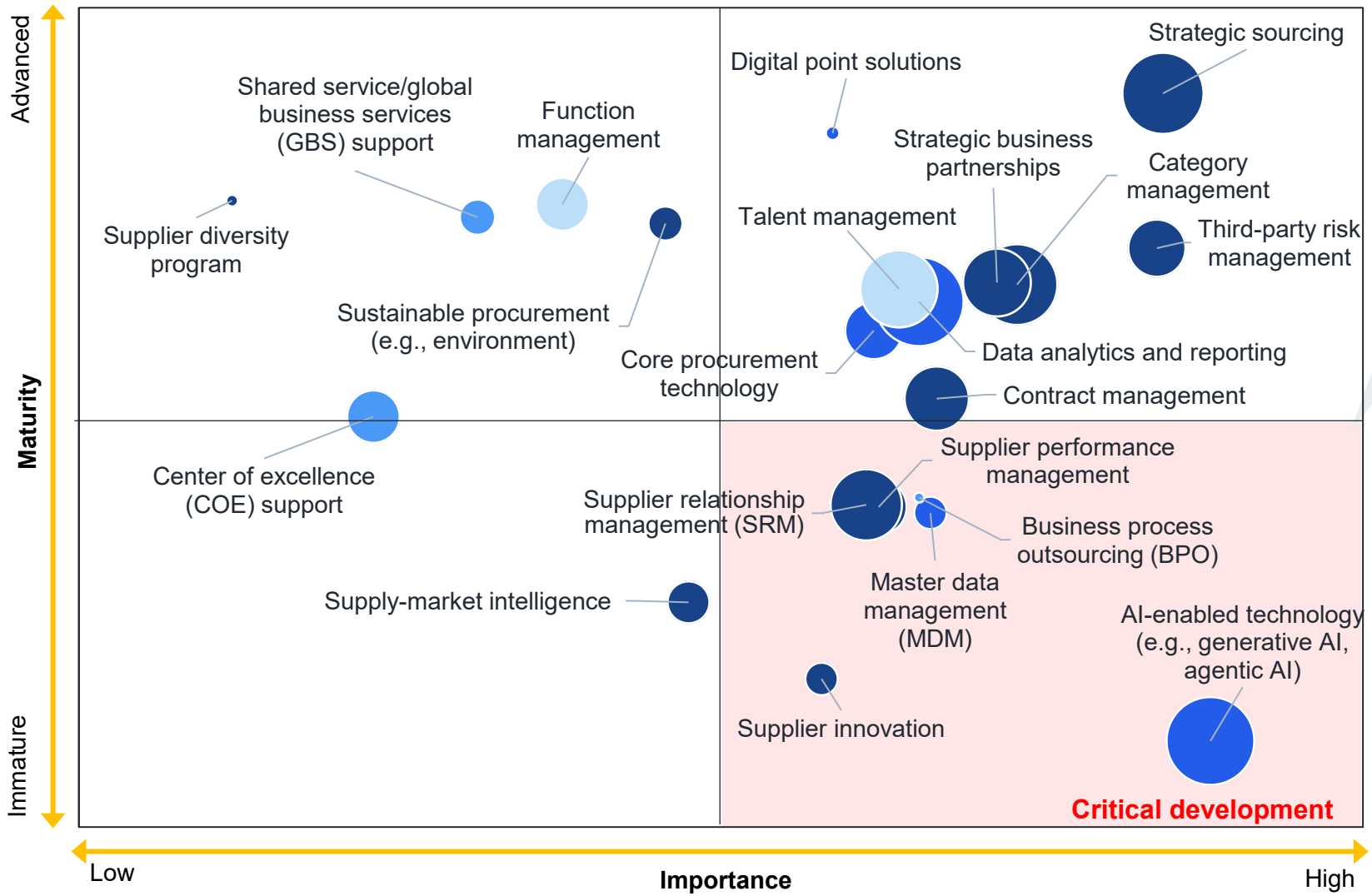
Service design and delivery | Digital transformation | Organization design and service partnering | Human capital

Q. Please select the top 10 improvement initiatives on your organization's 2026 procurement transformation agenda. (Select up to 10.)
Q. Please rate the importance and maturity level of the top 10 improvement initiatives on your 2026 procurement transformation agenda.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

2026 procurement improvement initiatives: Critical development areas

PROCUREMENT IMPROVEMENT INITIATIVES – IMPORTANCE VERSUS MATURITY



AI-enabled technology, supplier performance management and supplier relationship management are leading capability development opportunity areas.

Respondents report higher maturity for other important initiatives (e.g., strategic sourcing, third-party risk management, category management and strategic business partnerships).

- Service design and delivery
- Digital transformation
- Organization design and service partnering
- Human capital

Size indicates percentage of organizations with an improvement initiative underway

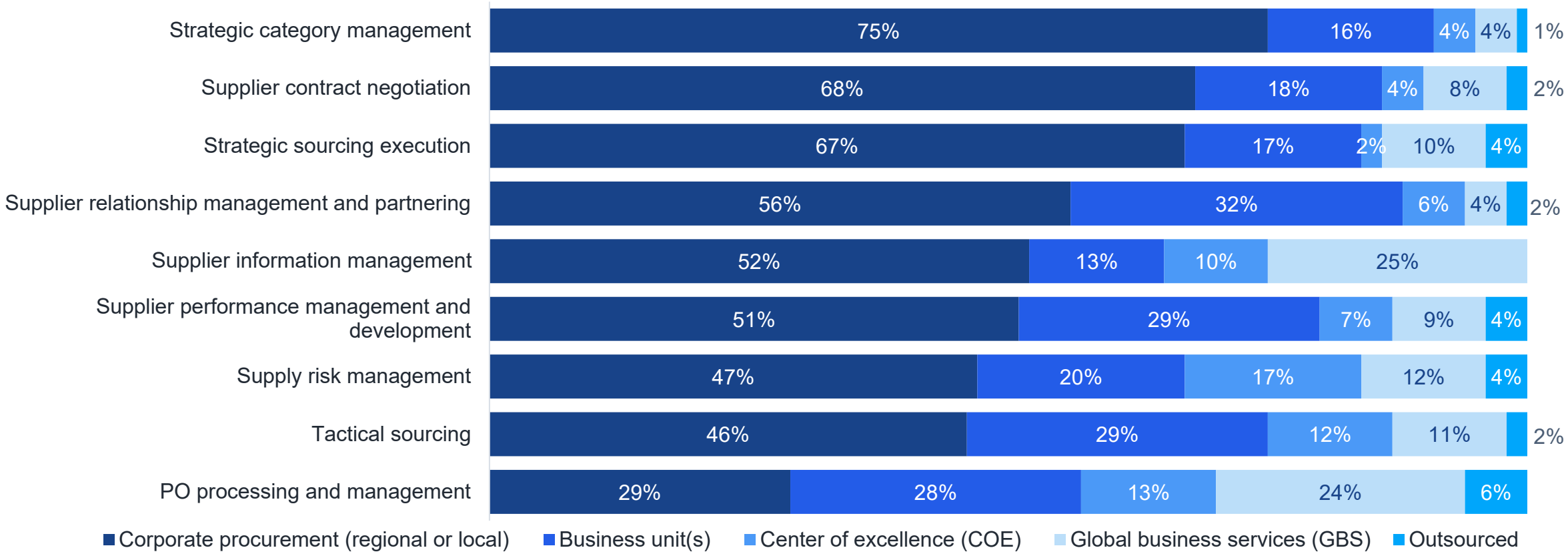
Q. Please select the top 10 improvement initiatives on your organization's 2026 procurement transformation agenda. (Select up to 10.)
Q. Please rate the importance and maturity level of the top 10 improvement initiatives on your 2026 procurement transformation agenda.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Service placement for key procurement processes

More than half of the staff managing key procurement processes are based in the corporate procurement team for most processes, with the exception of more transactional processes, such as tactical sourcing and PO processing and management. Business unit personnel play a key role in supplier relationship management and partnering. GBS and outsourcing are more likely to play a role in transactional rather than strategic processes.

PROCUREMENT PROCESS SERVICE PLACEMENT



Q. Please enter the percentage of total full-time equivalents (FTEs) supporting the processes below by the different service placement options.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

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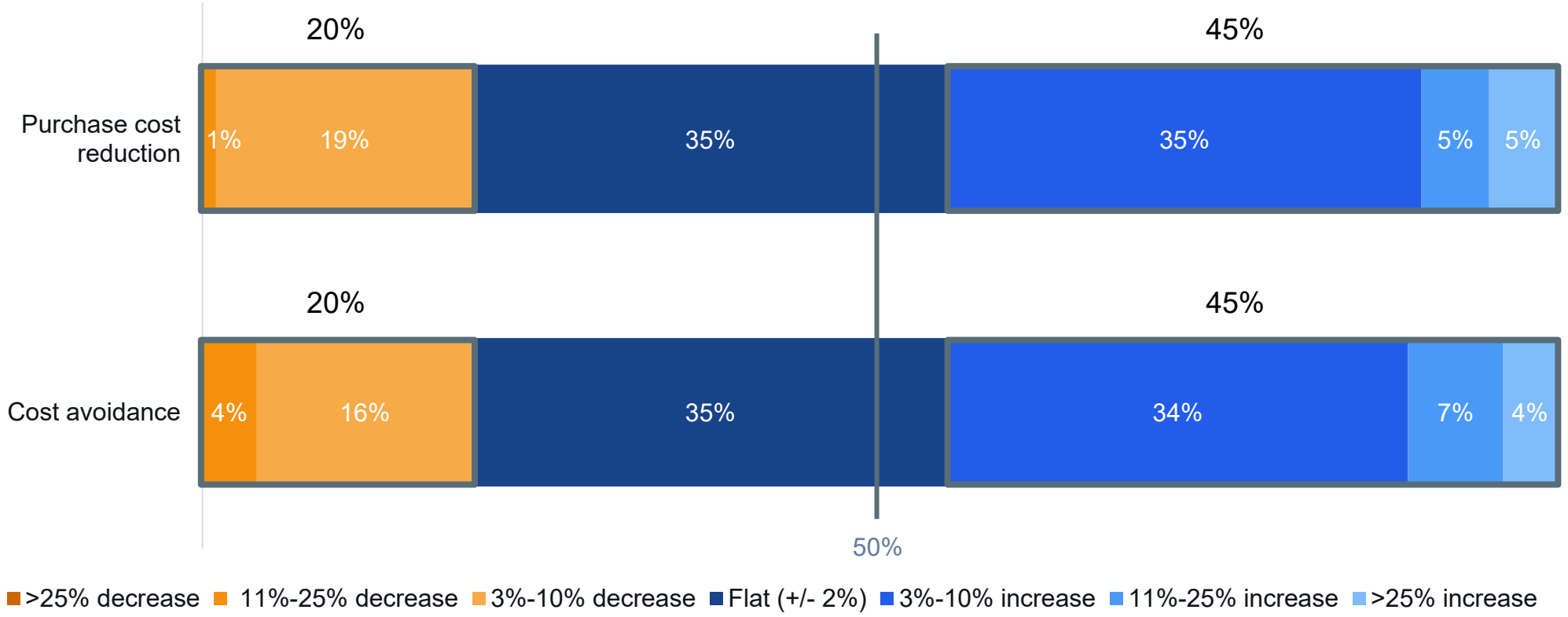
Projected cost savings and value levers

Projected change in procurement savings for 2026

Procurement teams are projecting higher levels of savings in 2026 compared to 2025 for both purchase cost reduction and cost avoidance. For purchase cost reduction, 20% of participants anticipate a decrease in savings versus 45% who project an increase. For cost avoidance, 20% of respondents expect a decrease in savings compared to 45% who foresee an increase. Projected savings expectations for 2026 are less optimistic overall than those expressed in the 2025 study.

PROJECTED PERCENT CHANGE FROM 2025 TO 2026 FOR PROCUREMENT SAVINGS



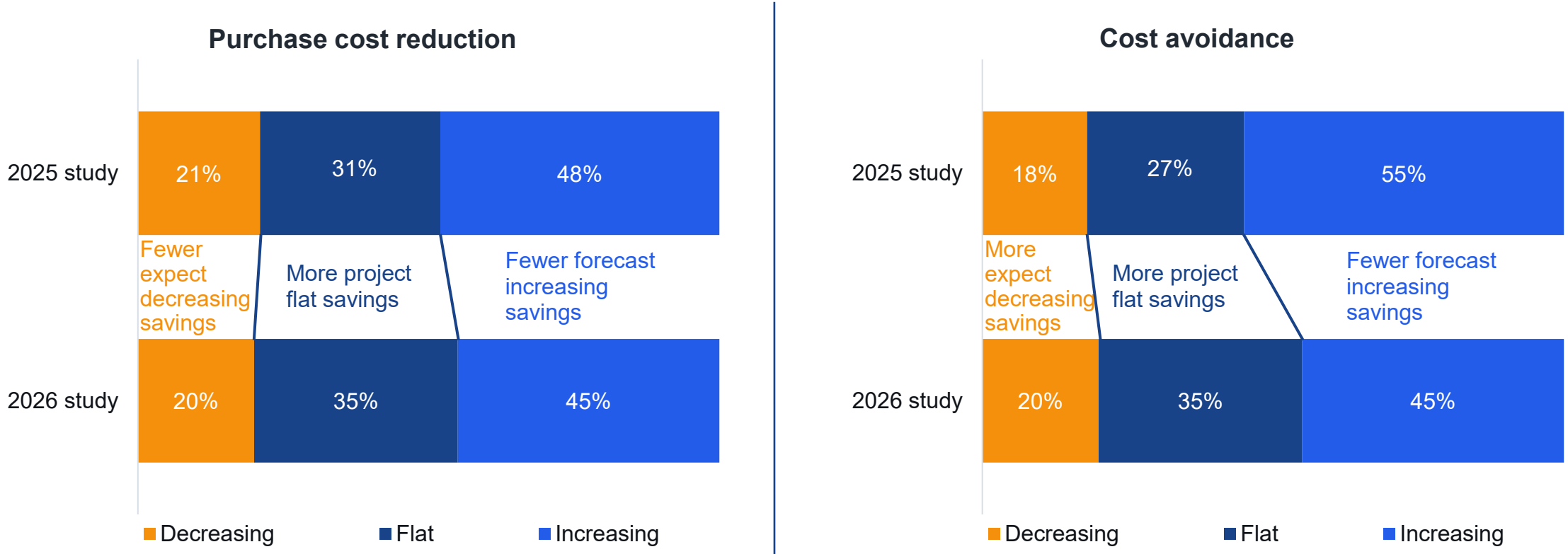
Q. What levels of savings are expected for 2026 compared to 2025?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Side-by-side evolution: Projected change in procurement savings for 2026

Procurement teams have lowered their expectations for purchase cost reduction and cost avoidance savings in 2026. For both types of savings, the level of participants forecasting decreasing savings levels has remained relatively stable, with only minor shifts. However, the percentage of respondents expecting flat savings levels in 2026 has increased compared to expectations for 2025. In addition, fewer contributors are projecting increasing savings levels.

PROJECTED PERCENT CHANGE IN YEAR ON YEAR PROCUREMENT SAVINGS



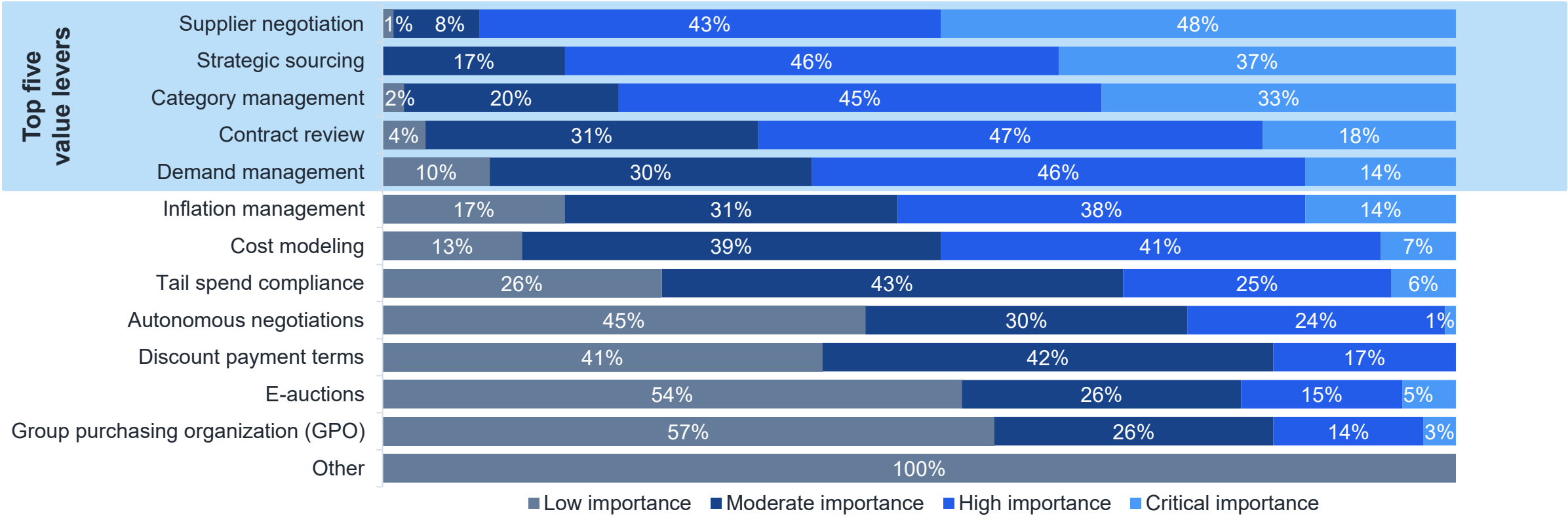
Q. What levels of savings are expected for 2025 compared to 2024?
Q. What levels of savings are expected for 2026 compared to 2025?

Source: The Hackett Group® 2025 Procurement Agenda and Key Issues Study; The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Savings and value realization techniques

The techniques expected to drive the greatest increase in savings and value realization in 2026 are supplier negotiation, strategic sourcing, category management, contract review and demand management. All of these techniques are traditional approaches for managing strategic spend areas. Interestingly, there is lower importance placed on autonomous negotiations, which can help procurement teams to achieve significant gains in speed, efficiency and scale.

SAVINGS AND VALUE REALIZATION TECHNIQUES



Q. Please rate the importance of the following techniques to drive increased savings and value realization in 2026.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Greatest and lowest cost savings in 2026: Direct spend categories

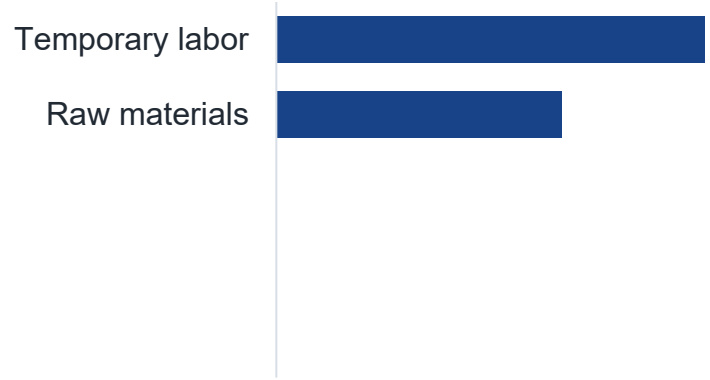
When respondents were asked which three direct spend categories are expected to yield the greatest savings in 2026, the most commonly cited categories were packaging, chemicals, contract manufacturing, logistics and raw materials. Temporary labor and raw materials were the spend categories most commonly projected to provide the lowest levels of direct spend savings in 2026.

GREATEST AND LOWEST COST SAVINGS IN 2026: DIRECT SPEND CATEGORIES

Greatest cost savings (cited multiple times)

Other spend categories with only one citation: AI, coffee, COGS, computing, cytokine, direct materials, direct services, fabrications, fuel, glycols, lecithin, machined parts, metals, operating costs, plastics, powdered beverages, ramen noodles, reactors, soy, tanks/cylinders, temporary labor

Lowest cost savings (cited multiple times)



Other spend categories with only one citation: Beef products, biologics, candy bars, clinical development services, electrical controls, fragrance ingredients, hydrocarbon, instrumentation, manufacturing aids, manufacturing services, MRO materials, natural sweeteners, packaging, peripheral components, power and connectivity, seafood, technology, trade compliance, turpentines

Q. Which three direct and indirect spend categories do you project will yield the greatest cost savings in 2026?
Q. Which three spend categories do you project will yield the lowest cost savings in 2026?

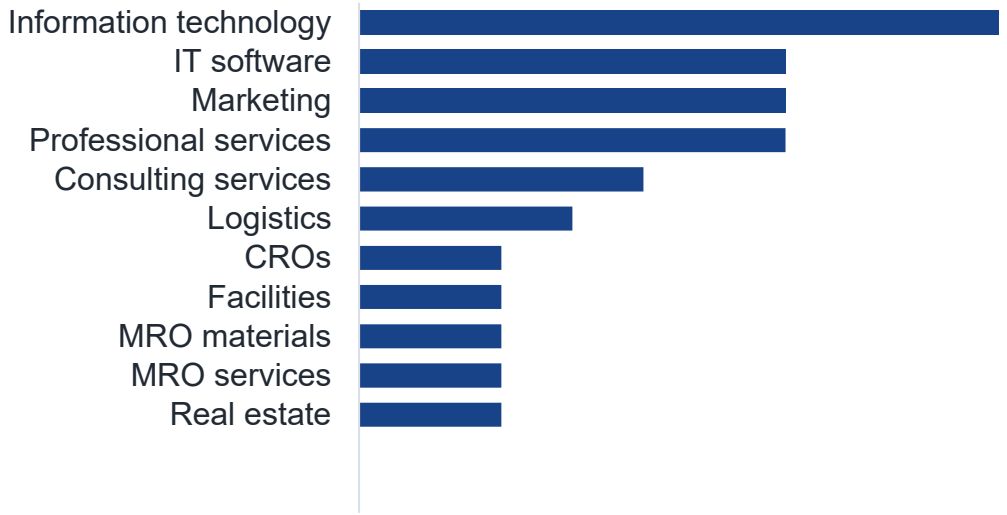
Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Greatest and lowest cost savings in 2026: Indirect spend categories

When respondents were asked which three indirect spend categories are expected to yield the greatest savings in 2026, the most commonly cited categories were information technology, IT software, marketing and professional services. Legal services, office supplies, and travel and entertainment were the spend categories most commonly projected to provide the lowest levels of indirect spend savings in 2026.

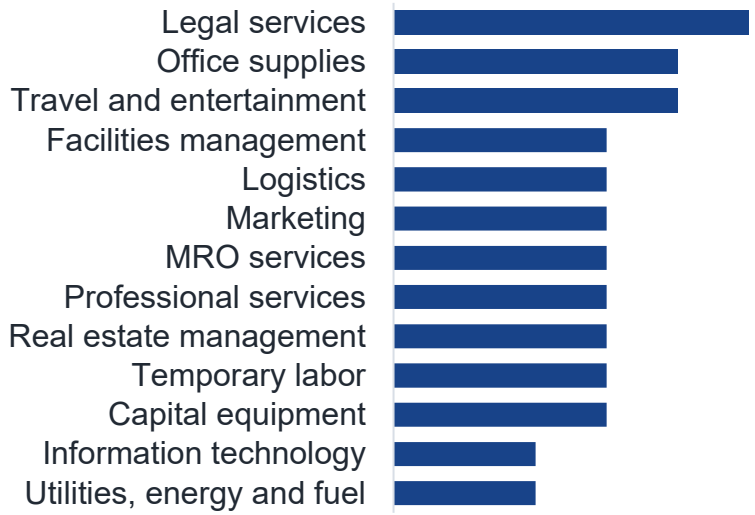
GREATEST AND LOWEST COST SAVINGS IN 2026: INDIRECT SPEND CATEGORIES

Greatest cost savings (cited multiple times)



Other spend categories with only one citation: Capital equipment, clinical technology, commercial services, corporate services, data center, food and beverage, FSP, HR services, IT hardware, kitchen equipment, maintenance turnaround inspections, managed services, money movement, research, servicing, training and development, telecom

Lowest cost savings (cited multiple times)



Other spend categories with only one citation: Construction, consulting services, consumables, FCM, HR information systems, IT cloud services, IT hardware, leasing, logistics/warehousing, market data, marketing: TV/film production, payroll services, ports, training and development

Q. Which three direct and indirect spend categories do you project will yield the greatest cost savings in 2026?
Q. Which three spend categories do you project will yield the lowest cost savings in 2026?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

The Hackett Group®

Technology adoption, growth and value

Myriad options exist for technology enablement across the source-to-pay landscape

SOURCE-TO-PAY TECHNOLOGY ECOSYSTEM

END-TO-END CORE PROCUREMENT TECHNOLOGIES

Upstream procurement tools

Spend analytics	E-sourcing	Contract lifecycle management (CLM)	Supplier lifecycle management
▪ Identify category opportunities ▪ Aggregate and report on enterprise spend ▪ Cleanse and rationalize spend data	▪ Define requirements ▪ Conduct RFx ▪ Evaluate suppliers ▪ Optimize bids ▪ Conduct e-auctions	▪ Create and store contracts ▪ Maintain standard templates ▪ Manage negotiation workflow ▪ Milestone alerts	▪ Master data management (MDM) ▪ Supplier self-service ▪ Supplier registration ▪ Certification maintenance

Downstream procurement tools

Services procurement	E-procurement	E-invoicing	E-payables
▪ Manage requisition workflow ▪ Benchmark rates ▪ Maintain service agreements ▪ Track time and approval workflow	▪ Maintain e-catalogs ▪ Search approved suppliers ▪ Punchout to supplier catalogs ▪ Create requisitions	▪ Input/upload invoices ▪ Match invoices ▪ Manage discrepancy resolution ▪ Approve payments	▪ Electronic payments ▪ Third-party payment programs ▪ Dynamic discounting solutions

Supporting procurement technologies

Supply risk management	Supplier performance management	Supplier collaboration and innovation	Category management	Project pipeline and savings tracking	Intake and orchestration	Tail spend management and marketplaces	Sustainability/ ESG	Advanced analytics	Data marketplace/data feeds

AI-enabled technologies

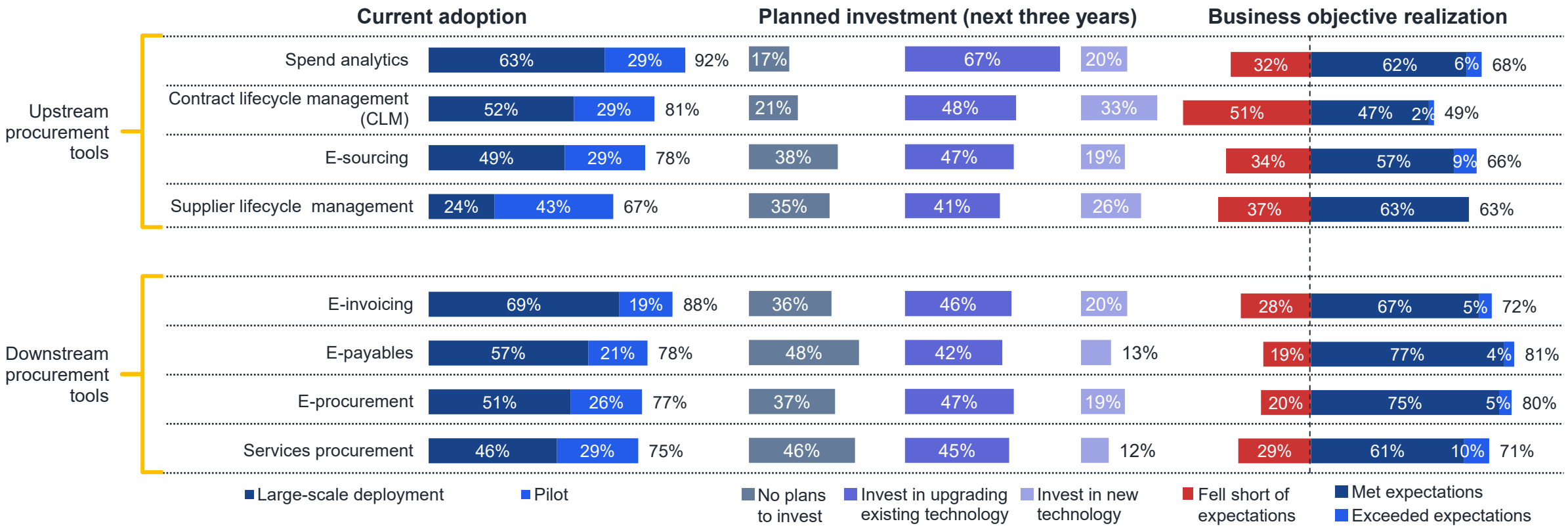
Generative artificial intelligence (Gen AI)	Agentic artificial intelligence (AI)	Predictive artificial intelligence (AI)	Machine learning (ML) and deep learning	Natural language processing (NLP)	Anomaly detection	Recommendation engines	Computer vision

Source: The Hackett Group®

Technology adoption and objective realization: End-to-end core procurement technologies

There is a high level of adoption of end-to-end core procurement technologies, with continued investment planned over the next three years, demonstrating the importance of technology enablement. Spend analytics, CLM and e-sourcing solutions are key planned investment areas. CLM and supplier lifecycle management solutions fell short of expectations for more respondents. E-payables, e-procurement and e-invoicing tools had the highest levels of objective realization.

TECHNOLOGY ADOPTION AND BUSINESS OBJECTIVE REALIZATION



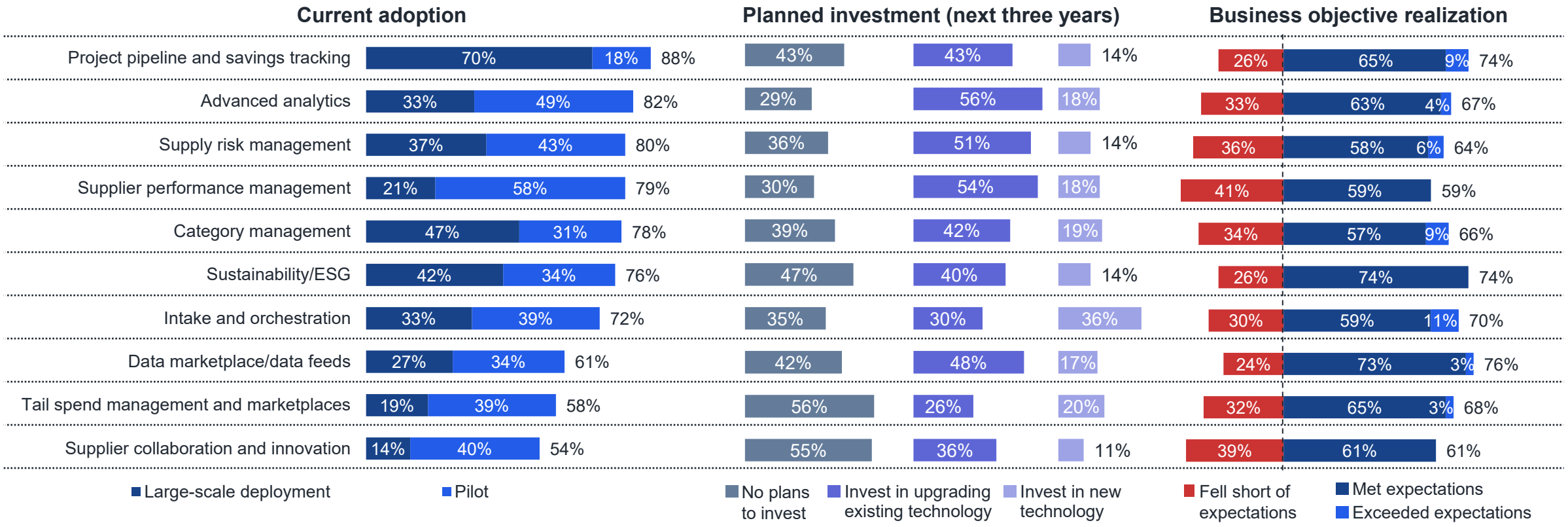
Q. What is the current level of adoption in system functionality to support your procurement function?
Q. What is the planned investment in system functionality over the next three years to support your procurement function? (Select all that apply.)
Q. Select the type of solution deployed and the extent to which realization of business objectives met expectations for the following technology projects executed in the procurement function over the last two years.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Technology adoption and objective realization: Supporting procurement technologies

The adoption of supporting procurement technologies is strong for project pipeline and savings tracking, advanced analytics and supply risk management. Advanced analytics and supplier performance management (SPM) solutions are key areas of planned investment. SPM and supplier collaboration systems fell short of expectations for more respondents. Data marketplaces/data feeds, sustainability/ESG, and project pipeline and savings tracking tools had the highest level of objective realization.

TECHNOLOGY ADOPTION AND BUSINESS OBJECTIVE REALIZATION



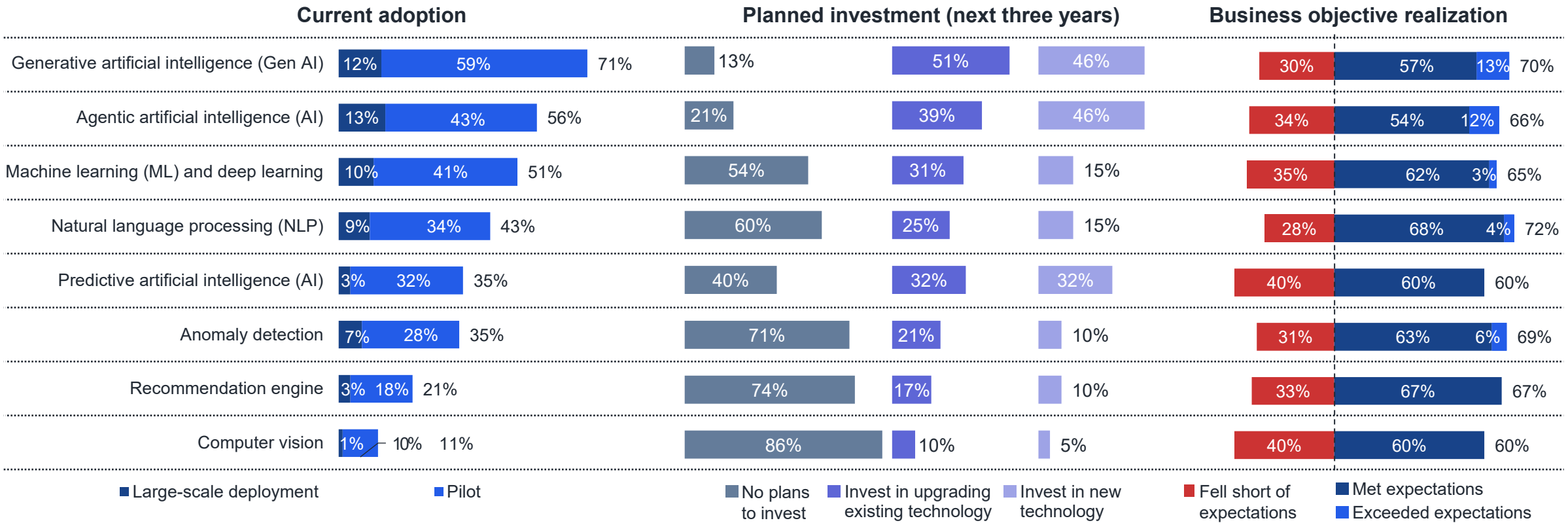
Q. What is the current level of adoption in system functionality to support your procurement function?
Q. What is the planned investment in system functionality over the next three years to support your procurement function? (Select all that apply.)
Q. Select the type of solution deployed and the extent to which realization of business objectives met expectations for the following technology projects executed in the procurement function over the last two years.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Technology adoption and objective realization: AI-enabled technologies

Gen AI, agentic AI and machine learning are the most widely deployed AI-enabled technologies. Strong deployment of both Gen AI and agentic AI technology is being reported, with a greater focus on pilots than on large-scale implementation. The level of planned investment in new technology is highest for Gen AI, agentic AI and predictive AI. Predictive AI and computer vision fell short of expectations for more respondents. NLP and Gen AI had the highest levels of objective realization.

TECHNOLOGY ADOPTION AND BUSINESS OBJECTIVE REALIZATION



Q. What is the current level of adoption in system functionality to support your procurement function?
Q. What is the planned investment in system functionality over the next three years to support your procurement function? (Select all that apply.)
Q. Select the type of solution deployed and the extent to which realization of business objectives met expectations for the following technology projects executed in the procurement function over the last two years.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Type of solutions deployed

Procurement teams are using suites and point solutions more than ERP systems, especially in the case of supporting procurement technologies. Suites are more heavily used for upstream and downstream procurement functionality, with point solutions being favored for specialty functionality, such as sustainability/ESG, data marketplace/data feed and advanced analytics solutions. Suites are used most often for e-procurement and e-sourcing.

System functionality		ERP	Suite	Point solution
Upstream procurement tools	Spend analytics	28%	37%	48%
	E-sourcing	29%	54%	22%
	Contract lifecycle management (CLM)	17%	45%	40%
	Supplier lifecycle management	29%	40%	36%
Downstream procurement tools	Services procurement	35%	37%	33%
	E-procurement	37%	56%	11%
	E-invoicing	43%	38%	23%
	E-payables	45%	30%	28%
Supporting procurement technologies	Supply risk management	22%	27%	55%
	Supplier performance management	26%	30%	48%
	Supplier collaboration and innovation	17%	42%	46%
	Category management	18%	33%	53%
	Project pipeline and savings tracking	14%	32%	55%
	Intake and orchestration	17%	38%	50%
	Tail spend management and marketplaces	25%	42%	39%
	Sustainability/ESG	20%	20%	68%
	Advanced analytics	22%	29%	61%
	Data marketplace/data feeds	13%	23%	64%

Q. Select the type of solution deployed and the extent to which realization of business objectives met expectations for the following technology projects executed in the procurement function over the last two years.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Type of solutions deployed (cont.)

AI-enabled technology is predominantly being deployed by procurement teams through point solutions. Procurement teams are also starting to access AI-enabled technology through suite solution providers. However, ERP providers should seize the opportunity to enhance their functionality with AI-enabled technology.

System functionality		ERP	Suite	Point solution
AI-enabled technology	Generative artificial intelligence (Gen AI)	14%	35%	67%
	Agentic artificial intelligence (AI)	14%	38%	68%
	Predictive artificial intelligence (AI)	18%	27%	55%
	Machine learning (ML) and deep learning	13%	20%	67%
	Natural language processing (NLP)	15%	31%	54%
	Anomaly detection	12%	29%	59%
	Recommendation engine	17%	17%	67%
	Computer vision	20%	20%	40%

Q. Select the type of solution deployed and the extent to which realization of business objectives met expectations for the following technology projects executed in the procurement function over the last two years.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

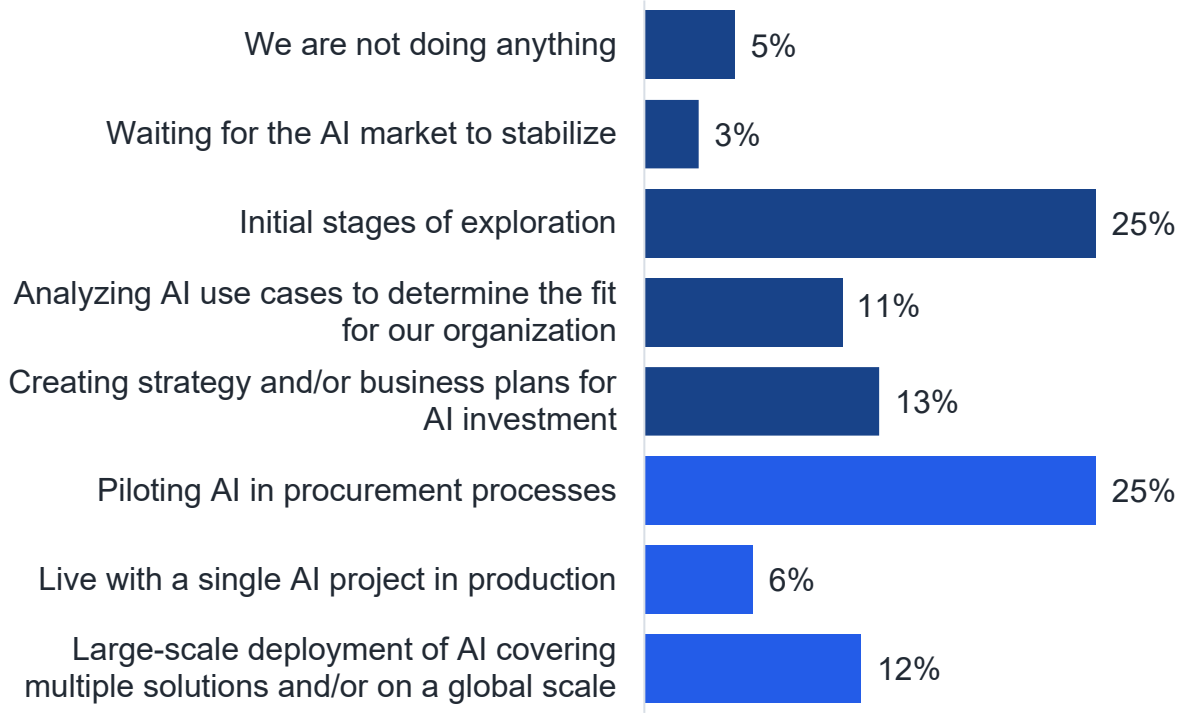
The Hackett Group®

Artificial intelligence (AI) journey and value delivery

AI-enabled technology adoption and implementation status

Forty-three percent of organizations are actively pursuing AI-enabled technology deployment. Specifically, 25% are piloting in procurement processes, 6% are live with a single AI project, and a further 12% report large-scale implementations. This is nearly twice the level (1.9X) of activity reported last year in the 2025 Procurement Agenda and Key Issues Study. While there is still an opportunity to do more, procurement teams have made great strides in AI adoption this year.

STATUS OF AI-ENABLED TECHNOLOGY ADOPTION



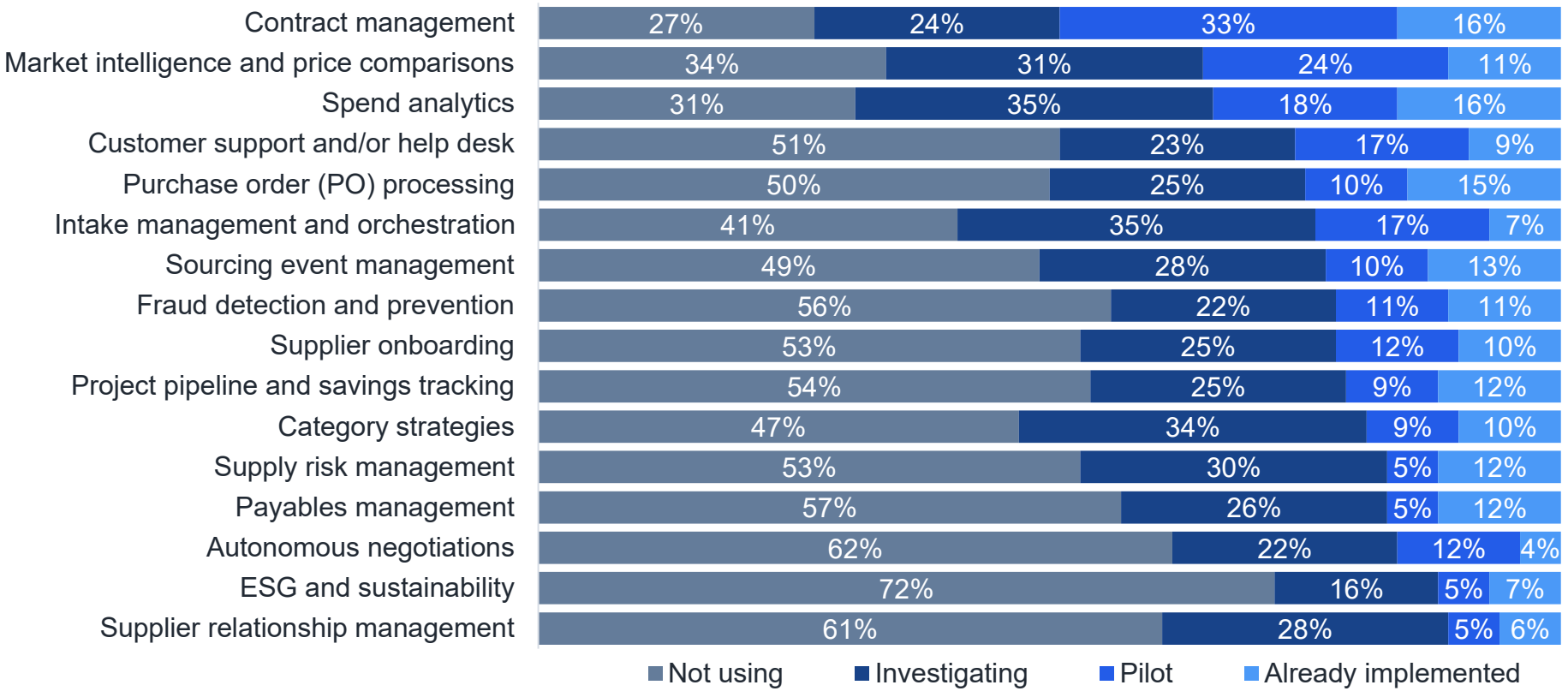
Q. Please select the option that best characterizes where your procurement organization is on its journey to deploy AI-enabled technologies (e.g., Gen AI, agentic AI).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

AI-enabled technology use case deployment

The most popular areas to actively pursue (i.e., pilot or already implemented) AI-enabled technology deployment include contract management (49%), market intelligence and price comparison (35%), spend analytics (34%) and customer support and/or helpdesk (26%). Procurement teams are also investigating implementation for spend analytics (35%), intake management and orchestration (35%) and category strategies (34%).

CURRENT STATUS OF AI-ENABLED TECHNOLOGY DEPLOYMENT



Status definitions:

- **Investigating:** Currently exploring or researching the application of AI-enabled technology for this process or activity.
- **Pilot:** There is an ongoing pilot project testing the application of AI-enabled technology for this process or activity.
- **Already implemented:** AI-enabled technology has already been implemented for this process or activity.

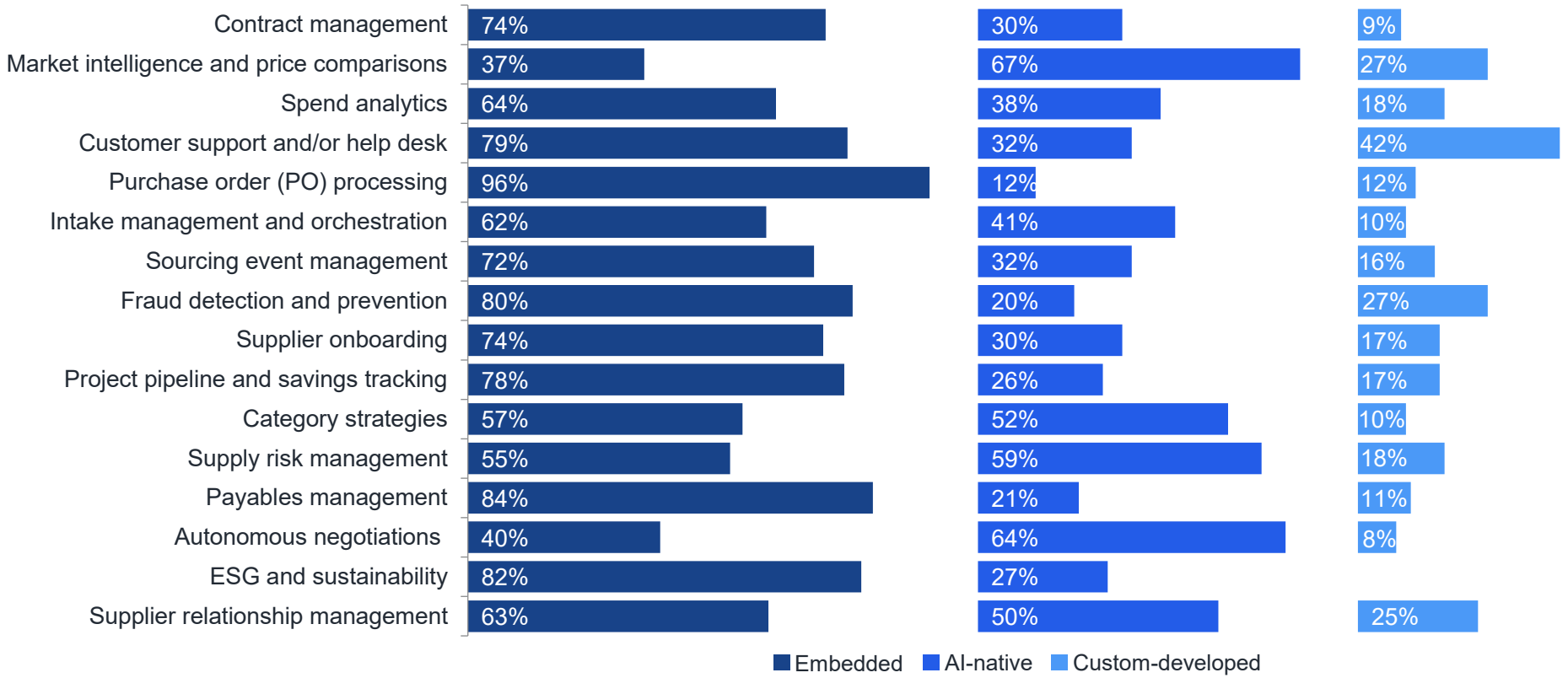
Q. Please indicate the progress made in pursuing the following potential procurement use cases for AI-enabled technology.
(Only include use cases where AI is formally integrated into workflows, not informal or individual use.)

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

AI-enabled technology deployment approach

Overall, organizations prefer to use embedded technology (69%), followed by AI-native solutions (38%) and custom-developed AI (17%). Using an embedded approach has grown in popularity since last year and is most prevalent for PO processing (96%) and payables management (84%). AI-native solutions are most commonly used for market intelligence (67%) and autonomous negotiations (64%). Customer support is the most common area for custom-developed tools.

AI-ENABLED TECHNOLOGY DEPLOYMENT APPROACH BY USE CASE TYPE



Deployment approaches:

- **Embedded:** AI-enabled functionality embedded into existing software solutions (e.g., Zycus, Coupa, SAP Ariba, Ivalua, JAGGAER).
- **AI-native point solution:** Solutions built from the ground up with AI at their core (e.g., Pactum, Keelvar, ORO Labs, GEP SMART, Suplari, Tonkean).
- **Custom-developed:** AI-enabled solutions custom developed and designed for specific functional use cases, including both custom development with outside expert assistance as well as via development toolkits (e.g., SAP Joule Studio, LangChain, CrewAI, Dify, Rasa).

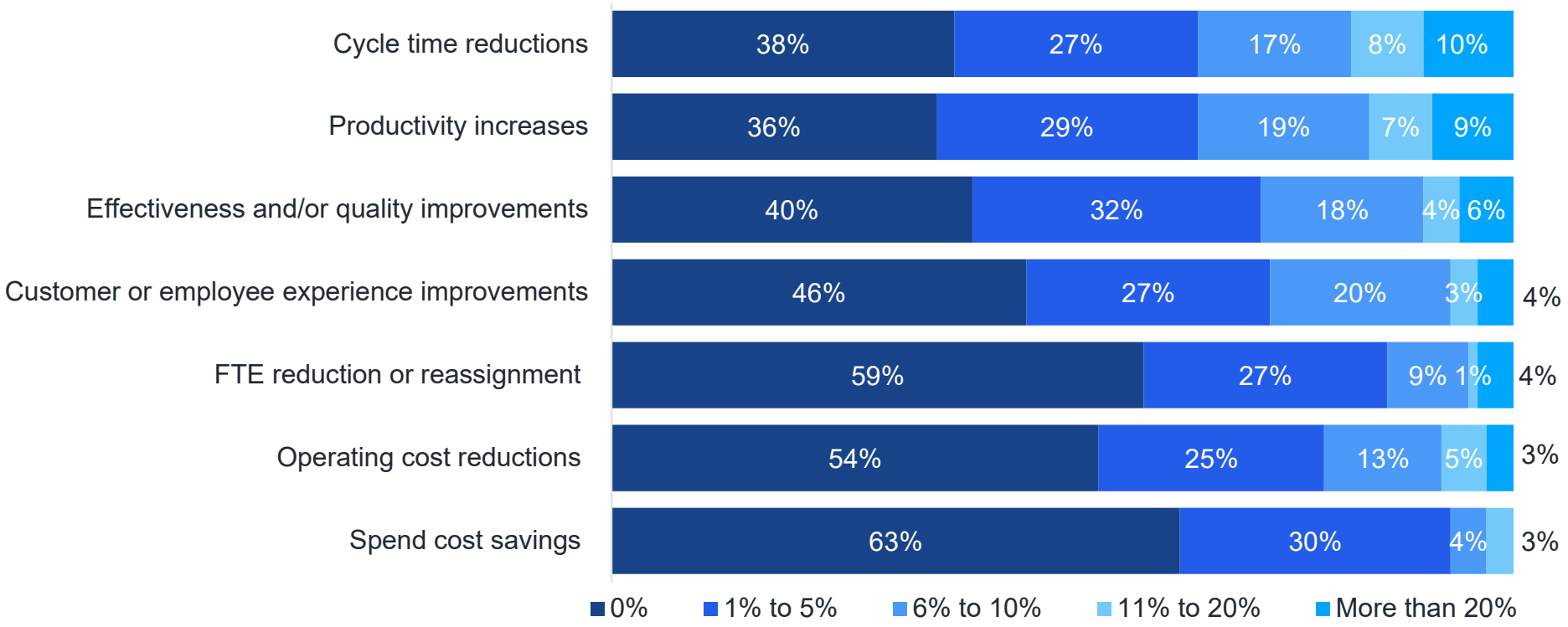
Q. Please indicate how the following potential procurement use cases for AI-enabled technology are being deployed or will be deployed.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

AI-enabled technology benefit potential

Procurement teams have made significant strides in deploying AI-enabled technology this year. They obviously brought a broader range of experience to bear compared to last year when answering this question about the level of value realization achieved from the use of AI-enabled technology. The highest levels of reported value realization are being seen in cycle time reductions, productivity increases and effectiveness and/or quality improvements.

AI-ENABLED TECHNOLOGY VALUE REALIZATION



Q. What value (real or perceived) has your organization begun to realize through its use of AI-enabled technology?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

The Hackett Group®

Conclusion

Conclusion

The economic outlook for 2026 is, once again, uncertain. Where the impacts from the Covid pandemic and inflationary pressures have driven economic concerns in the most recent timeframe, this year's insecurity is largely driven by trade tensions, geopolitical conflicts, monetary and fiscal policy ambiguity, and potential financial market volatility. As a result, expectations for cost savings in 2026 have been tamped down.

The factors expected to drive the greatest transformational impact on the way procurement performs its job over the next five years are AI-enabled technology, digital procurement and automation, the changing profile of procurement skills, and procurement transformation. All of these trends will require procurement teams to maximize the value realization from AI-enabled technology investments, develop deeper skills and expertise within the procurement team, and redesign their operating model to develop super-powered teams capable of delivering a broader value proposition.

Organizations expect workloads to increase in 2026, but they also expect staffing levels and operating budgets to fall. Technology expenditure is also expected to grow, very likely helping teams to close the productivity and efficiency gaps created by disparity between resource levels and operating budgets and workload expectations. Effectively deploying technology and seizing opportunities presented by AI-enabled functionality are key to ensuring competitive procurement performance in the upcoming year.

LOOKING AHEAD

Volatility from economic uncertainty and the acceleration of AI adoption are two key features of the outlook for 2026. Against this backdrop, procurement teams will need to adjust their priorities to ensure they can support their business stakeholders in achieving success in the upcoming year. Is your procurement organization equipped to support the broader enterprise's goals? How will you do more with less? How will you use AI-enabled technology to drive more value and seamlessly enable procurement processes? Do you have the required skills and capabilities available within your team? Is your operating model suitable to meet the challenges of a more competitive, AI-enabled business environment?

As you chart the course for success for your procurement team in 2026, ensure that you are giving full consideration to the following:

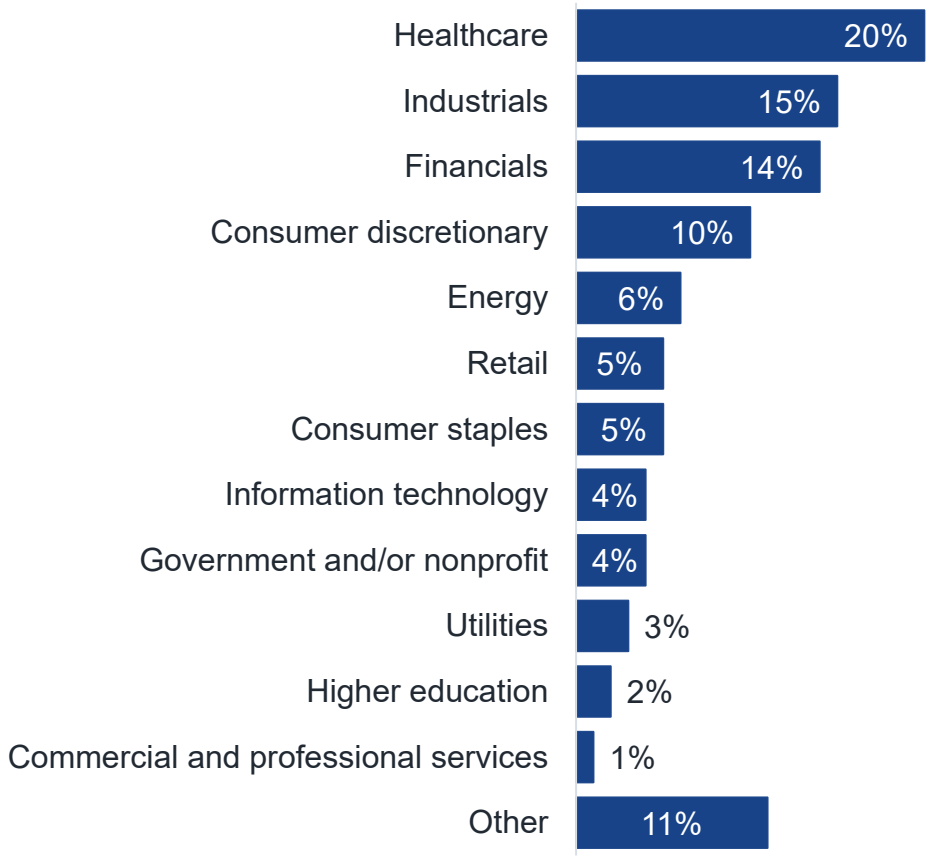
- Use AI-enabled technology to make a step change in the value your procurement team delivers to the wider business organization. Explore how to use technology to deliver new capabilities. Purposefully architect your AI digital landscape to make desired improvements (e.g., productivity, speed, cost, quality).
- Orient your procurement operating model to meet the needs of end-user stakeholders. Provide the capability to solve business problems, not just procurement problems. Reimagine the procurement operating model through an AI lens that elevates value creation.
- Proactively invest in managing talent and upskilling the procurement team to take advantage of the opportunities created by the rapidly evolving AI environment.

Source: The Hackett Group®

Appendix I: Participant profile

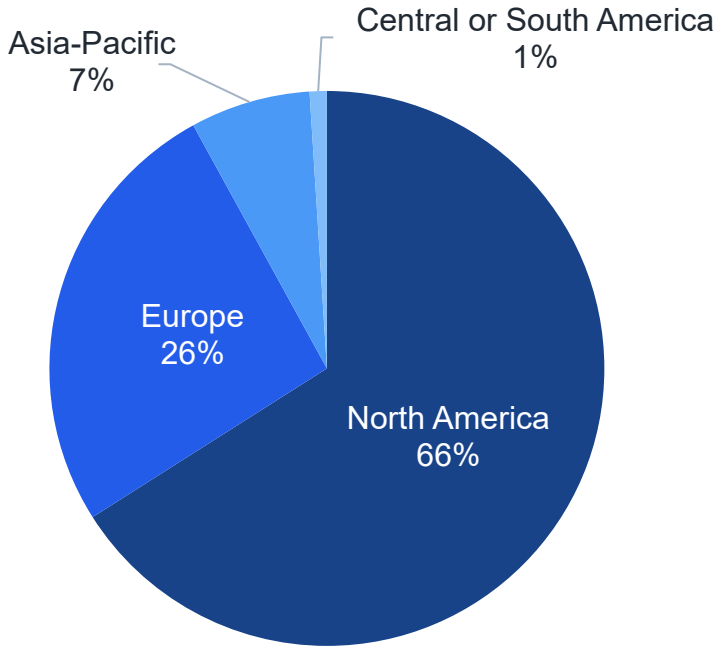
Overview of study participants

INDUSTRIES



Q. What industry classification(s) best represents your organization? (Multiple selections allowed.)

COMPANY HEADQUARTERS

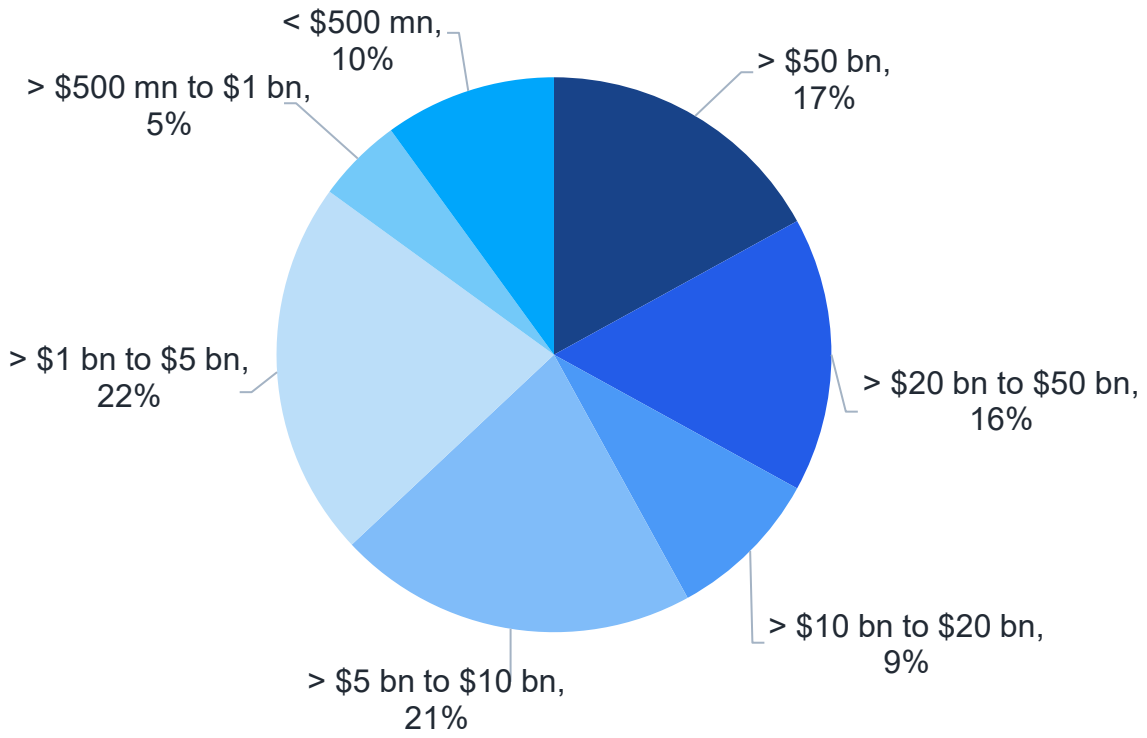


Q. In which geography is your company headquartered?

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

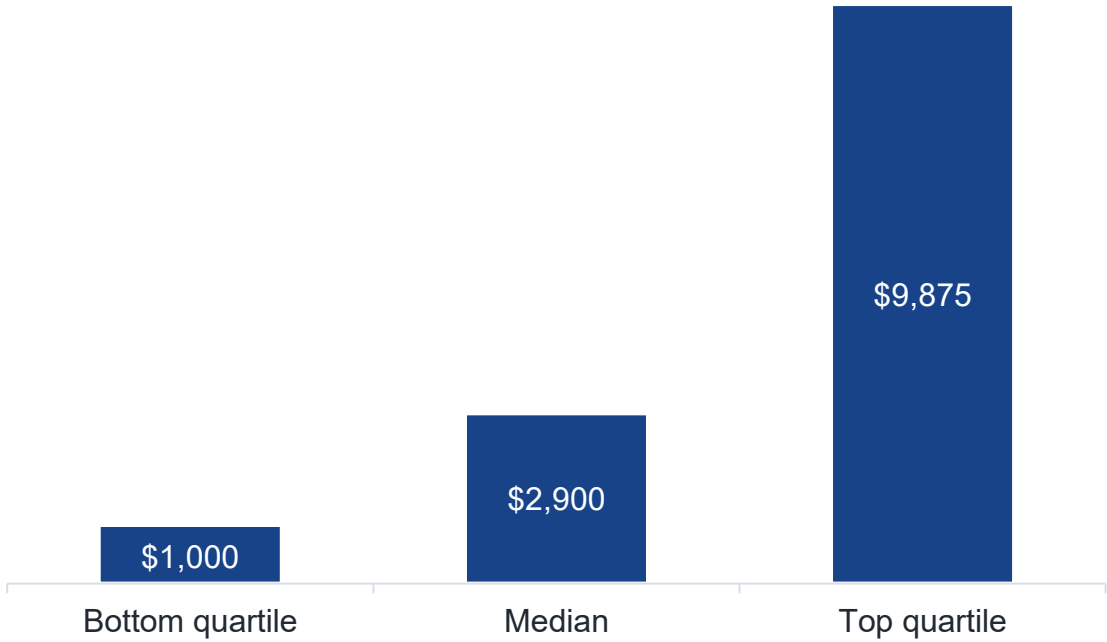
Overview of study participants (cont.)

ANNUAL NET REVENUE (USD)



Q. Please estimate your company's annual net revenue (USD).
Net revenue represents externally reported revenue less returns and allowances.

ANNUAL THIRD-PARTY SPEND (millions $)



Q. Please estimate your company's annual supplier spend (in USD millions).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Appendix II: Study definitions

Study definitions: Companywide business objectives

- **Increase market penetration:** Increase market share for existing products and/or services in existing markets.
- **Improve market development:** Expand into new markets with existing products and/or services.
- **Innovate products/services:** Develop new products or significantly modify existing products and/or services for growth.
- **Enhance customer satisfaction and experience:** Foster loyalty, retention and repeat business with existing customers.
- **Achieve cost leadership:** Reduce costs and improve margins to offer lower cost products and/or services.
- **Improve employee development and retention:** Enhance skills, capabilities and career satisfaction of employees while simultaneously reducing turnover and retaining top talent.
- **Accelerate mergers and acquisitions (M&A):** Acquiring market share by combining with other organizations.
- **Strengthen environmental, social and governance (ESG) strategies:** Improve adherence to laws, regulations and industry standards.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Procurement trends with a transformational impact

- **Ability to address a volatility, uncertainty, complexity and ambiguity (VUCA) operating environment:** Having the organizational readiness and leadership in place to successfully navigate a VUCA world (e.g., agility, adaptability, strategic mindset, resilience) arising from external market pressures (e.g., tariffs, geopolitical risk, inflation and cost pressures, labor markets) and other factors.
- **Artificial intelligence–enabled technology:** New procurement capability that will become available due to technological developments from intelligent automation technologies such as Gen AI, agentic AI, other AI, machine learning or cognitive computing.
- **Broadening the scope of the procurement responsibility:** Increasing expectations of procurement teams as business stakeholders seek support in areas such as supply risk management, digital transformation, and corporate environmental, social and governance (ESG) objectives.
- **Changing profile of procurement skills:** The need to recruit and develop team members with deep expertise across a variety of areas (e.g., digital proficiency, data analytics, business partnering, sustainability, risk management, innovation, supplier diversity).
- **Circular economy:** The focus on the reuse and regeneration of materials or products as a way to continue production in a sustainable or environmentally friendly way.
- **Commercial excellence:** The ability to enhance procurement's value proposition to create a competitive differentiator for your enterprise.
- **Cybersecurity:** The ability to manage risks associated with confidential data access, intellectual property (e.g., product design specifications), data privacy, management of critical company data, cloud and/or data security, cyberattacks or cyberfraud.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Procurement trends with a transformational impact (cont.)

- **Deep real-time data and insights visibility:** Provides procurement with real-time visibility to support proactive decision-making and allow procurement to drive commercial outcomes.
- **Digital procurement and automation:** The digitalization of procurement processes that have traditionally been manual (e.g., autonomous sourcing, contract authoring and review, category strategy development).
- **Innovation:** The ability for procurement teams to develop the next generation of suppliers that will fuel supply innovation and provide the organization with a competitive advantage.
- **Responsible procurement:** The ability for procurement teams to establish robust policies, processes and governance to support corporate environmental, diversity and ethical objectives.
- **Supply chain resilience:** Having supply chains that are resilient enough to ensure supply continuity even when supply disruptions occur in the market (e.g., dual sourcing, nearshoring supply chains, supply chain transparency).
- **Procurement transformation:** The ability to implement transformational changes (e.g., process, system, operating model) and accelerate adoption while simultaneously delivering on procurement fundamentals (e.g., sourcing, savings).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Techniques to drive increased savings and value realization

- **Autonomous negotiations:** The use of AI-enabled solutions to interface with suppliers to negotiate contracts. The focus is usually on lower-value suppliers that are traditionally not fully managed. AI-enabled negotiation solutions allow procurement teams to provide commercial coverage for more of the overall supply base.
- **Category management:** Category management is an ongoing, cross-functional approach to managing similar areas of spend. Category plans synthesize market dynamics, existing spend profiles and business requirements to define category initiatives. Category planning should confirm that the right set of initiatives is being pursued with the appropriate timing and priority assigned for each initiative.
- **Contract review:** Review existing contracts to ensure negotiated commercial terms are being maximized. Ensure agreed rebates have been collected, price breaks are being applied, payment terms are correct on invoices, penalties are assessed, etc.
- **Cost modeling:** Having a clear understanding of the cost elements and the relevant proportion of each element to enable a constructive discussion with suppliers about the purchase price being offered. There are several approaches for cost modeling, including building the cost models internally with commodity/market data, working with third-party market intelligence providers to source typical cost models, or gathering cost breakdowns directly from suppliers (i.e., as part of quotes requested during a sourcing event).
- **Demand management:** Reduce third-party spend by decreasing demand, either through curbing spending by end users (e.g., policy changes) and/or optimizing specifications to reduce volume needed and, therefore, total cost while still meeting business requirements.
- **Discount payment terms:** Renegotiating credit periods with suppliers by moving from longer “net” payment terms to shorter discount payment terms. An early payment discount is provided by the supplier in exchange for the buyer settling an invoice before it’s due.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Techniques to drive increased savings and value realization (cont.)

- **E-auctions:** Real-time auctions between a buying organization and prequalified suppliers that compete against each other to win the business to supply goods and/or services with clearly defined specifications.
- **Group purchasing organization (GPO):** A GPO is an entity created to leverage the purchasing power of a group of businesses to obtain discounts from suppliers based on the collective buying power of its members.
- **Inflation management:** Use of cost modeling to assess the true inflationary impact of market conditions to stave off inflationary price increases or claw back previous price increases.
- **Strategic sourcing:** The aim of the strategic sourcing process is to "funnel down" the supply market to the best suppliers to meet the requirements of the business. The process identifies, evaluates and negotiates with suppliers to optimize the savings that can be realized.
- **Supplier negotiation:** Working with both existing and new suppliers to improve the commercial terms in the contract with a focus on cost reductions.
- **Tail spend compliance:** Establishing new approaches to manage tail spend (i.e., spend that is not actively managed by the strategic procurement organization). For example, the use of e-catalogs, services procurement tools, online marketplaces, business-to-business (B2B) cards and/or buying desks.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Service placement options

- **Corporate procurement team:** FTEs that are part of the corporate procurement team with a primary reporting line through the chief procurement officer (CPO) or equivalent leader of the procurement organization. These FTEs can be physically located in regional hubs or local facilities, as long as they report through the leader of the procurement organization.
- **Business unit(s):** FTEs that are part of a procurement team that has a primary reporting line through the business unit leadership team. These FTEs are usually located in regional hubs or local facilities but report through the business unit leadership team, rather than the leader of the procurement organization.
- **Global business services (GBS):** FTEs that are part of the GBS or shared services organization with a primary reporting line through the leader of the GBS organization. These FTEs are usually located in regional hubs and are managed by the GBS leadership team.
- **Center of excellence (COE):** FTEs that are part of the COE team with a primary reporting line through the leader of the COE. A COE is an entity, either physical or virtual, that consolidates activities requiring critical and/or specialized skill sets with a focus on developing as a core competency. COEs typically report through the leader of the procurement organization, but can also be found as part of a GBS team.
- **Outsourced:** Third-party resources that manage the delivery of procurement processes that would otherwise be completed by internal employees. Typically, an outsourcing relationship is managed with an SLA or contract to deliver predefined procurement activities.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Procurement processes

- **Strategic category management:** The process of analyzing and profiling spending behavior, as well as developing category strategies that align with organization business partners to optimize the value of the supply base.
- **Strategic sourcing execution:** The process of identifying, validating and selecting suppliers for direct materials, indirect materials, and capital goods and services for strategic suppliers (i.e., high-spend value).
- **Supplier contract negotiation:** The process of negotiating terms, delivery, price and quantities with suppliers.
- **Tactical sourcing:** The process of identifying, validating, and selecting suppliers and agreeing commercial terms for tactical purchases (i.e., low-spend value).
- **Supplier performance management and development:** The process of enabling supplier agreements, measuring supplier performance and developing supplier capabilities.
- **Supplier relationship management and partnering:** The process of developing and enhancing supplier relationships.
- **Supply risk management:** The process of defining potential supply risks, assessing risk, establishing mitigation and continual monitoring of the supply base.
- **PO processing and management:** The process of completing contractual documentation to formalize a purchase transaction with a supplier, including order acknowledgement.
- **Supplier information management:** The process of managing item master, catalog records, contract content and supplier master files; maintenance activities include adding, editing, or deleting information contained in such files/records.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: System functionality

- **Spend analytics:** Identify category opportunities, aggregate and report on enterprise spend, cleanse and rationalize spend data.
- **E-sourcing:** Define requirements, conduct RFx, evaluate suppliers, optimize bids, conduct e-auctions.
- **Contract lifecycle management (CLM):** Create and store contracts, maintain standard templates, manage negotiation workflow, milestone alerts.
- **Supplier lifecycle management:** Master data management (MDM), supplier self-service, supplier registration, certification maintenance.
- **Services procurement:** Manage requisition workflow, benchmark rates, maintain service agreements, track time and approval workflow.
- **E-procurement:** Maintain e-catalogs, search approved suppliers, punchout to supplier catalogs, create requisitions.
- **E-invoicing:** Input/upload invoices, match invoices, manage discrepancy resolution, approve payments.
- **E-payables:** Electronic payments, third-party payment programs, dynamic discounting solutions.
- **Supply risk management:** Supply risk reporting, risk monitoring and supply chain visibility.
- **Supplier performance management:** Supplier performance tracking, supplier scorecarding and satisfaction surveys.
- **Supplier collaboration and innovation:** Knowledge sharing, inventory management, demand planning, engineering collaboration, innovation collaboration.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: System functionality (cont.)

- **Category management:** Develop category strategies, workflow with business partners, initiative creation and savings tracking.
- **Project pipeline and savings tracking:** Sourcing initiative tracking, workflow, savings tracking and reporting.
- **Intake and orchestration:** Solutions designed to support requisitioners in making purchases by guiding them through the process in a single “orchestration” level that is underpinned with enhanced workflow to automate transactions and provide status visibility.
- **Tail spend management and marketplaces:** Business-to-business marketplaces (e.g., Amazon Business), manage payments with one-time vendors.
- **Sustainability/ESG:** Enables procurement sustainability/ESG objectives with functionality such as data management, reporting, risk identification or supply base monitoring.
- **Advanced analytics:** Predictive modeling, big data analytics, modeling, simulation, unstructured data analytics, etc. May be based on statistical algorithms, or AI and machine learning technology.
- **Data marketplace/data feeds:** Third-party data products which are acquired to combine with internal data to enhance data analytics insights.
- **Generative artificial intelligence (AI):** Mimics human thinking by providing context-based knowledge, allowing it to create new content (e.g., summaries, responses).
- **Agentic artificial intelligence (AI):** Autonomous agents that execute tasks or orchestrate workflows without step-by-step human input.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: System functionality (cont.)

- **Predictive artificial intelligence (AI):** Augments human intelligence by processing complex unstructured data and providing insights and predictions driven by algorithms (e.g., spend, demand, supplier risk, or contract renewal likelihood).
- **Machine learning (ML) and deep learning:** Pattern-learning models used for forecasting, scoring, classification or optimization. Deep learning is a specialized subset of ML that uses artificial neural networks with multiple layers to analyze data and make predictions or decisions.
- **Natural language processing (NLP):** A form of AI that extracts or interprets meaning from text-based data (e.g., contracts, invoices, feedback).
- **Anomaly detection:** A machine learning–based technology to flag unusual or suspicious transactions, exceptions or data outliers.
- **Recommendation engine:** A system that uses algorithms and machine learning to analyze data and provide suggested next-best actions, suppliers, sourcing paths and/or approvals.
- **Computer vision:** Technology that uses machine learning, deep learning and neural networks to analyze visual inputs (e.g., scanned invoices or receipts) to extract meaningful information and enable actions based on what is “seen.”

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Technology investment levels

- **No plans to invest:** We have no plans to invest in technology in this area over the next three years.
- **Invest in upgrading existing technology:** We are planning on upgrading existing technology (e.g., staying with the existing vendor/solution but upgrading to a more current release or adding on additional modules).
- **Invest in new technology:** We plan to invest in new technology to provide the functionality (i.e., either switching to a new solution provider or adding new functionality that you don't have today).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Technology solution types

- **Enterprise resource planning (ERP):** A core business system used to support day-to-day business activities and manage financial transaction processing (e.g., SAP, Oracle, Infor).
- **Suite:** Integrated source-to-pay solutions that provide the functionality to source, request, procure, receive, and pay for goods and services across an enterprise (e.g., Coupa, SAP Ariba, Ivalua, JAGGAER, Zycus).
- **Point solution:** Solutions not part of the core procurement application suite offering best-in-class functionality and features supporting a specific procurement process.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: AI-enabled technology use case status

- **Investigating:** The organization is currently exploring or researching the application of AI-enabled technology for this process or activity.
- **Pilot in progress:** There is an ongoing pilot project testing the application of AI-enabled technology for this process or activity.
- **Already implemented:** AI-enabled technology has already been implemented for this process or activity.

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

Study definitions: Gen AI deployment approaches

- **Embedded:** AI-enabled functionality that software vendors have embedded into their existing solutions to enhance the power and experience of using their core applications (e.g., Zycus, Coupa, SAP Ariba, Ivalua, JAGGAER).
- **AI-native point solution:** Solutions built from the ground up with AI at their core, deeply integrating machine learning, real-time analytics, and adaptive algorithms to streamline and optimize the entire procurement process (e.g., Pactum, Keelvar, ORO Labs, GEP SMART, Suplari, Tonkean).
- **Custom developed:** AI-enabled solutions that have been custom developed and designed for specific procurement use cases. This encompasses both custom development with outside expert assistance as well as the use of agentic development toolkits (e.g., SAP Joule Studio, LangChain, CrewAI, Dify, Rasa).

Source: The Hackett Group® 2026 Procurement Agenda and Key Issues Study

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