PT | Procurement Tactics

Procurement Trends 2027

The future of procurement is here and it’s reshaping the industry now more than ever.

PROCUREMENT TRENDS 2027

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INTRODUCTION

Procurement, Redesigned

Procurement Trends 2027

To get real value from AI, procurement needs to move beyond individual use, redesign how the work gets done, and redesign the team around it, where the skills AI lacks, empathy, negotiation, and relationship management, matter more than ever.

At the same time, an unstable world economy is handing the function a bigger job: securing supply, consolidating the supply base, and keeping up with compliance that has overtaken sustainability.

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In 2027, using AI will no longer set procurement teams apart.

Nearly every team will have it. Far fewer will be able to show the CFO what it delivered in savings, speed, or better decisions. That gap between widespread AI use and measurable value will be one of the defining tensions of 2027, and the CPO sits right in the middle of it.

At Procurement Tactics, we spent the past months going through the research that matters, listening to what procurement leaders said on stage at DPW Amsterdam 2026, and comparing it with what we hear in our own conversations with procurement professionals. The same themes came back every time.

Recurring themes in procurement conversations:

01 The work is changing faster than the organization

02 The knowledge that makes a buyer valuable is walking out the door

03 The entry-level jobs that used to grow the next generation are disappearing

None of that gets solved by buying another tool. It is shaped by how you organize the team, how you keep the trust of suppliers and the business, and how clean the data underneath is.

AI changes the tools; the skills that decide the outcome stay human: judgment, negotiation, stakeholder management and the supplier relationships that no model can hold for you.

And the outside world is not waiting. Tariffs change every few months, energy and metal prices move faster than contracts, supply chains are moving away from China, and compliance has quietly overtaken sustainability as the topic that fills the agenda.

This report brings those changes together in 12 trends, grouped in three themes: AI from use to value, protecting the human edge, and procurement's role in an unstable world economy. Each trend ends with the choices we believe procurement leaders and professionals have to make.

Procurement Trends 2027 at a glance

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THEME

01

AI from use to value

AI is no longer the new thing in procurement. It is the thing everyone has. The three trends in this theme are about turning use into value: proving the return, fixing the data underneath, and building the workflows where people and agents work together.

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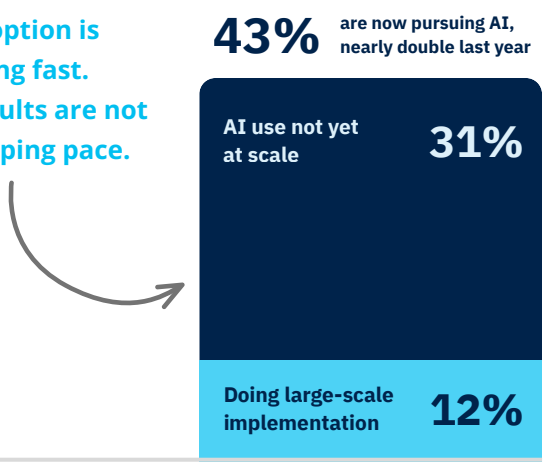
TREND 1

AI shifts from adoption to value

AI use is everywhere; proof of value is not. In 2027, the CFO wants savings, speed, and better decisions, not usage figures or hours saved.

Inside procurement, adoption is earlier than the headlines suggest, and proof of value is rarer still. The share of procurement organizations actively pursuing AI nearly doubled in a year to 43%, The Hackett Group found, while only 12% report large-scale implementation.

Adoption is rising fast. Results are not keeping pace.

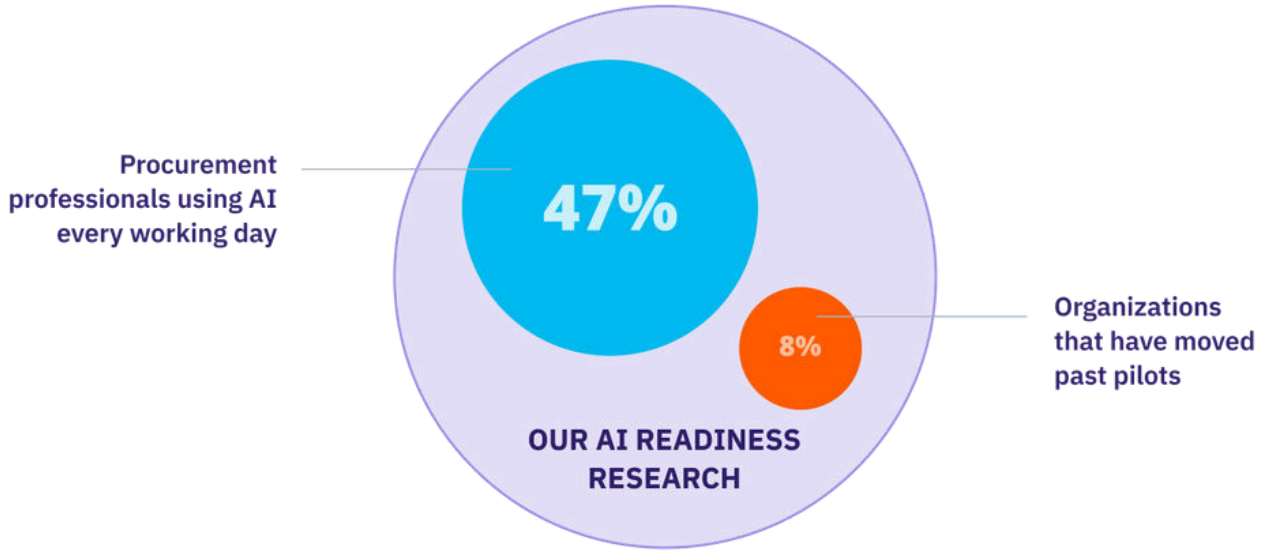


The Hackett Group

Part of the problem is what we measure. Usage rates, number of use cases, and hours saved describe activity, not outcomes.

The value sits in what your team does differently because AI has freed up capacity: better supplier decisions, faster sourcing events, risk caught earlier, or categories that finally get managed.

Finance has started asking the question out loud, and the costs are catching up with the savings: AI surcharges in software renewals, usage-based pricing, and integration work all land in the same budget. Of the 600 CFOs in Coupa's survey, 76% see unclear ROI as a barrier to further AI investment, and Gartner predicts that over 40% of agentic AI projects will be canceled by the end of 2027 because of cost, unclear value, or inadequate risk controls. Hervé Le Faou, chief procurement officer of Heineken, said during DPW Amsterdam 2026 that agentic AI "costs much more than we thought" and delivered only 30 to 40% of the role savings the company had planned for.



Our own AI readiness research with Suplari shows the same gap inside procurement: 47% of procurement professionals already use AI every working day, but only 8% of their organizations have moved past pilots. Individual use is everywhere. Organizational value is not.

WHY THIS WILL SHAPE 2027

2027 is the year the AI budget gets a reckoning.

The CFO who approved the pilots wants a number, and "the team saves 10 hours a week" will not be enough. Show what the freed capacity produced, or expect a tighter budget round.

ACTIONS YOU SHOULD TAKE

Make AI prove its value before you scale it.

- [ ] **Decide what AI has to prove before it gets more budget.**

  Pick the outcomes that count (savings captured, cycle time, risk caught, decision quality) and make them the condition for scaling, so usage and hours saved stop being the measure of success.

- [ ] **Choose up front what the saved time is for**

  Category strategy and supplier development, or running with fewer people. Left open, the time disappears into fixing and checking AI output.

- [ ] **Choose where in your own category AI has to prove itself first, and judge it by a result the CFO would accept:**

  Savings captured, or days cut from a sourcing event. Until it has, treat every other use case as a pilot, not a plan.

TREND 2

Clean data before clever AI

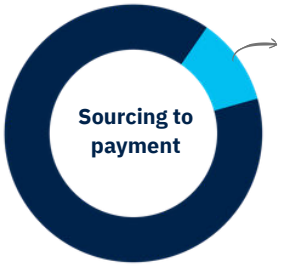
AI is only as good as the supplier, contract, and spend data it reads. Companies now pay for clean data first, and intake platforms keep it clean.

In our conversations with procurement teams, the AI pilots that stall rarely fail on the model. They fail on a supplier that exists four times under different names, a contract whose end date was never entered, or spend classified by whoever was in a hurry that month. AI reads what is there. If what is there is wrong, the recommendation is wrong, and your team stops trusting the tool within a month.

The numbers back that up. Only 11% of organizations run one unified procurement data model from sourcing to payment, Ivalua and Ardent Partners found; McKinsey estimates that procurement functions use less than 20% of the data available to them; and 50% of procurement leaders name data quality as the leading barrier to scaling AI, according to ProcureAbility. Klaus Staubitzer of Siemens said during DPW Amsterdam 2026 that 80% of the company's AI effort goes into data cleaning, and that one electronic component carried a different ID in every plant, so global demand could not be seen until a single material ID was created.

The real AI bottleneck is data

The numbers that back it up



11%
run one unified data model across the whole process

89%
don't have a unified data model across source-to-pay

Ivalua and Ardent Partners

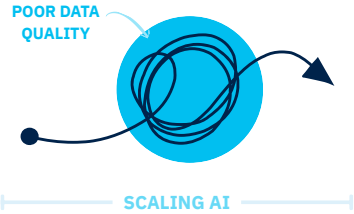
<20% of the data available to procurement actually gets used

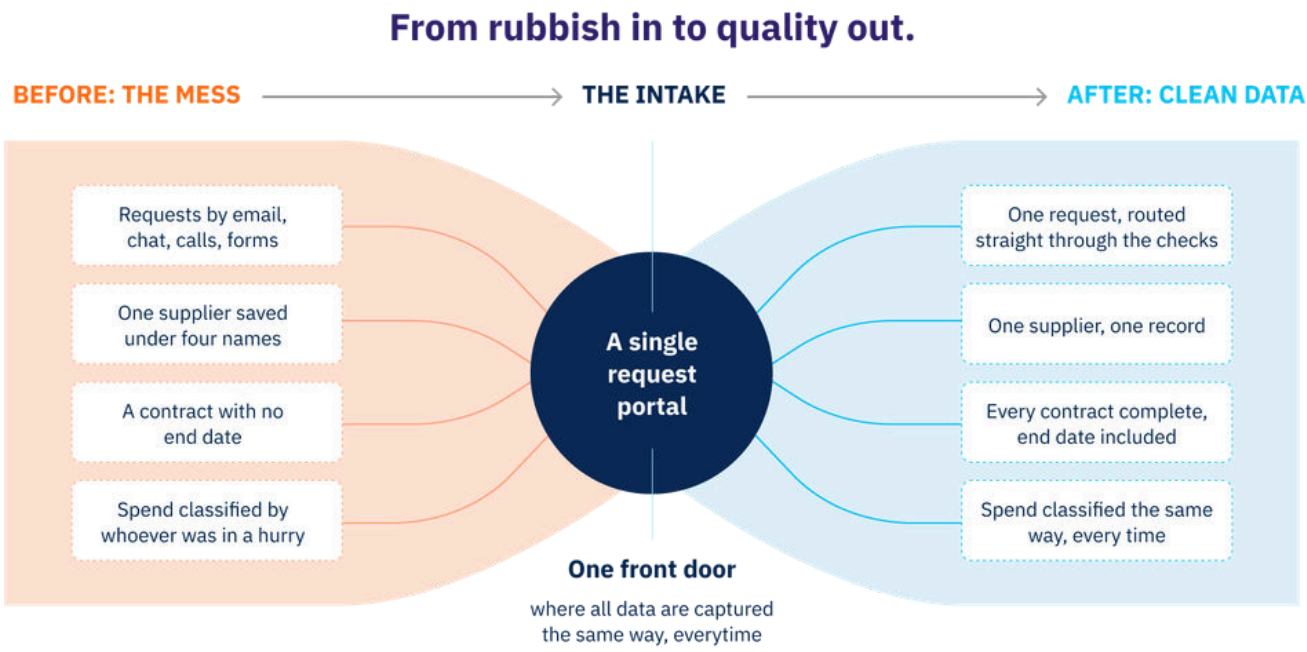


McKinsey

50%
of procurement leaders name **data quality** as the top barrier to scaling AI

ProcureAbility





This is why intake and orchestration has become the most talked about category in procurement technology: one front door for every request.

The business describes what it needs in plain language, and a workflow layer routes it through budget, legal, security and procurement checks, capturing every supplier, contract and spend record the same way from day one.

The large suite vendors are buying orchestration specialists for exactly that reason.

Danone's procurement team explained during the same DPW event that 40,000 of its 65,000 suppliers and 750,000 of its 900,000 transactions represented only 10% of spend, and that it moved them to a digitized desk so buyers could concentrate on the rest.

Our AI readiness research with Suplari scores the data foundation of procurement organizations at 2.1 out of 5. 76% have fragmented or merely consolidating data, 71% have siloed or limited system integrations, and 0% report a unified data ecosystem.

WHY THIS WILL SHAPE 2027

2027 is the year companies stop buying AI on top of broken data and start paying for the plumbing.

Less exciting than an agent demo, but it is where the next two years of AI value will be decided.

ACTIONS YOU SHOULD TAKE

Fix the data before you buy the tool.

- [ ] **Rank the data that matters most and fund it properly:**

  Usually the supplier master, contract terms, and spend classification. Everything else can stay imperfect for now.

- [ ] **Put data first, tools second.**

  Approve no AI use case or intake platform until someone can answer "what data does this need, and do we have it", and accept that this will cause some delay.

- [ ] **Clean the data you own before you ask for a tool**

  Duplicate suppliers, missing contract end dates, and misclassified spend in your own categories. A category with clean data is the first place any AI pilot will work.

TREND 3

Human-AI collaboration becomes part of everyday procurement work

Agents take over execution; buyers supply context, judgment, checks and exceptions. The division of work, and who answers for the outcome, has to be redesigned.

The first wave of AI in procurement helped individuals finish tasks: a contract summary, a first draft of an RFP, a cleaner spend cube. The second wave is different. AI agents are moving into the workflow itself, taking on more of the execution, while the buyer's work shifts toward giving context, exercising judgment, checking outputs and handling exceptions, and toward the supplier conversation itself, which no agent should own. Humans and AI are now doing different parts of the same sourcing event, and 78% of supply chain leaders plan to reach at least a moderate level of supply chain autonomy by 2027, KPMG's 2026 US Supply Chain Survey found.

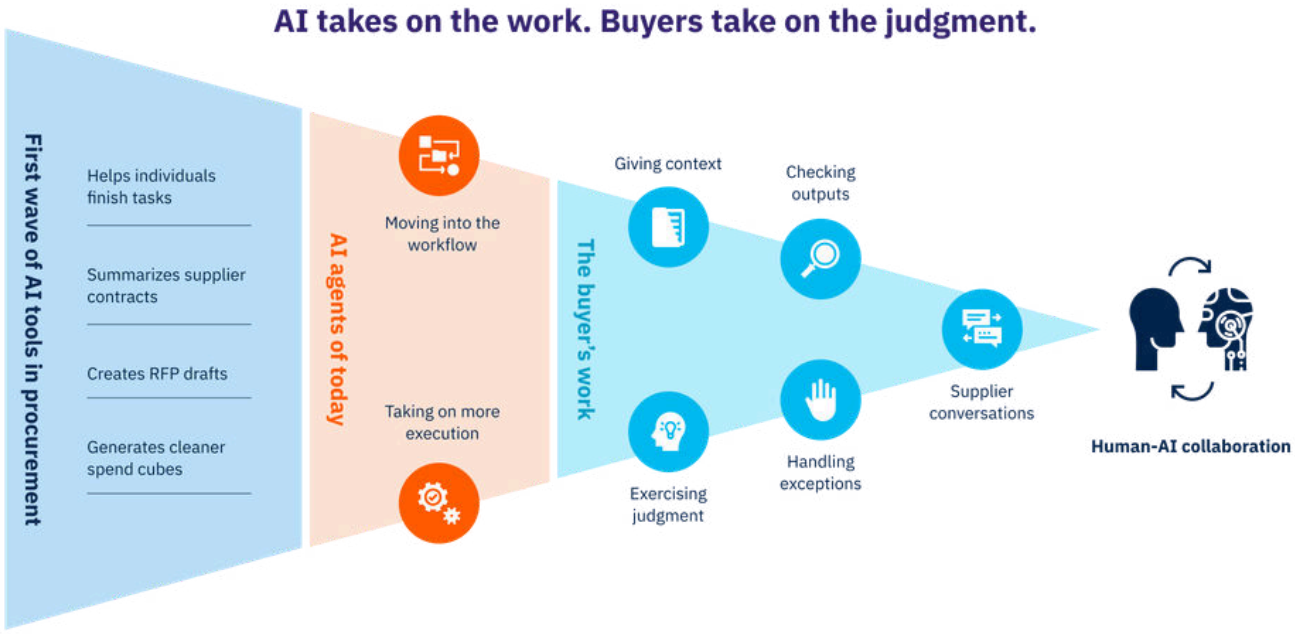
Procurement is already there in places. Nitin Krishnakumar of JLL explained during DPW Amsterdam 2026 that the company created a permanent "procurement operator" role, a buyer who runs and supervises a set of agents from one central team, and cut its sourcing events from 9–12 weeks to three.

Philipp Sona of Mercedes-Benz described a model with three lanes of work: tasks agents run on their own, tasks where a buyer checks the agent, and tasks a buyer leads with agent support. The more independently an agent can act, the more carefully you have to decide where human review is still needed, when a buyer should step in, and who stands behind the outcome when an agent has negotiated a price or approved a supplier.

Mercedes-Benz Model



More autonomy = more guardrails



Yet redesign lags behind the technology. Only 36% of chief procurement officers are very confident they can redesign the function for AI, Gartner found, and as early as 2025, McKinsey reported that only 21% of organizations using generative AI had fundamentally redesigned any workflows, even though workflow redesign has the biggest effect on whether AI shows up in the bottom line. From what we hear in 2026, most procurement teams are still adding agents to the old process and leaving everyone guessing who checks what.

WHY THIS WILL SHAPE 2027

In 2027, the procurement team will not be replaced by agents, but it will be rebuilt around them.

The buyers who thrive are the ones whose role was redrawn on purpose: supervising results, handling exceptions, or owning supplier relationships.

ACTIONS YOU SHOULD TAKE

Define the human role before the agent's.

- [ ] **Keep a written list of the decisions AI is not allowed to make, whatever it is technically capable of:**

  Supplier selection above a set value, contract terms, and escalations with strategic suppliers. Decisions of high importance never go to AI in the first place. Review the list once a year.

- [ ] **Redesign roles before adding more AI agents.**

  Choose what the procurement team becomes: supervisors of results, specialists who handle the exceptions, or owners of supplier relationships. The job will change either way, so prepare the people in the redesigned roles before the agents go live.

- [ ] **Check every agent output that reaches a supplier as if your name were on it, because it is.**

  Keep a short log of what you corrected; it is the best evidence your team has for where the agent still needs a human.

THEME

02

Protecting the human edge

Every competitor has the same AI. These five trends are about what AI cannot copy: the skills of your current team, the trust of suppliers and stakeholders, the knowledge of your senior buyers, the juniors who have to learn it, and the CPO who designs the function around it. This is where the soft skills live.

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TREND 4

AI is intensifying a rapid skill change in procurement

Buyers now manage and check AI's conclusions instead of building the analysis. Every CPO has to decide which skills the team keeps, when to trust AI, and which work people must still be able to do themselves.

Getting value from AI depends on people knowing what to ask of it, when to challenge it, and how to use its output in context. In procurement, that means judgment, problem framing, negotiation, stakeholder management, and the ability to explain a decision to the business. Call them soft skills if you like; in 2027 they are the hard part of the job, and the part AI does not take over.

The catch is that AI takes over the very work through which buyers used to build those skills:

- Analyzing Spend
- Weighing Supplier Options
- Drafting the recommendation
- Learning from mistakes along the way

If you never do the analysis, it is hard to judge whether the AI got it right.

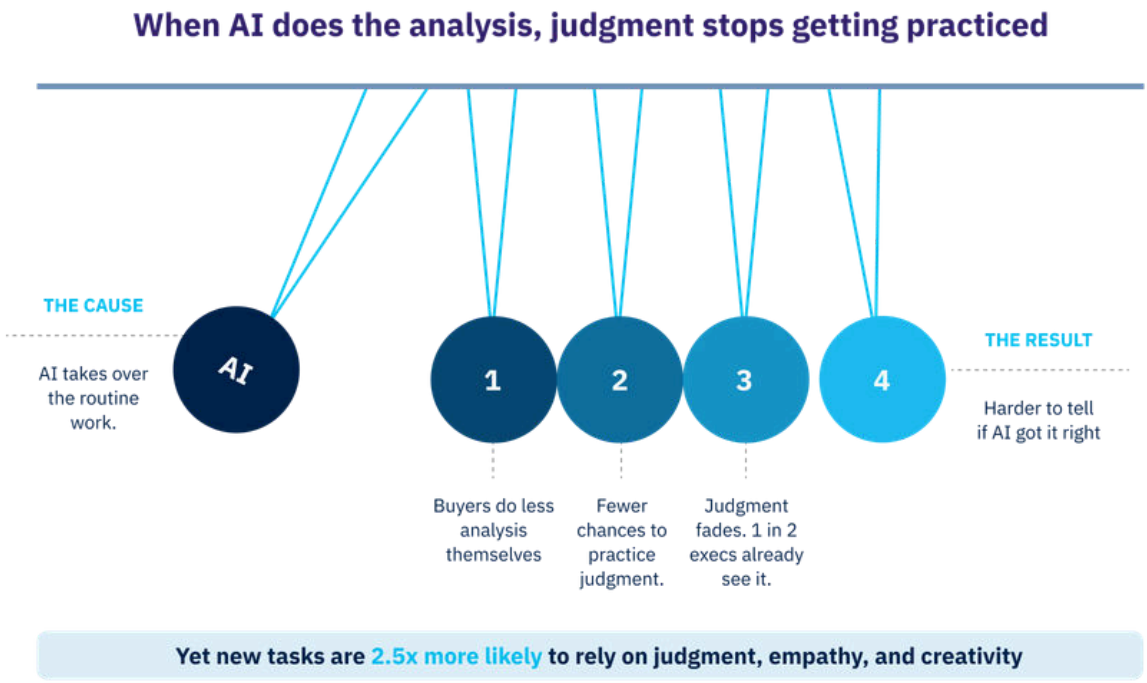
The job market already shows the shift. The tasks being added to AI-exposed roles are 2.5 times more likely to rely on empathy, judgment, and creativity than the tasks being removed, PwC's 2026 AI Jobs Barometer found. The other side is de-skilling: half of the 70 senior executives in BCG's survey already see it in their organizations, and more than 60% expect it to become a material threat within three to five years. Small sample, but the same signal we hear from procurement leaders.

You will not be able to hire your way out of it. 46% of procurement leaders are upskilling their current team while only 19% are adding headcount, ProcureAbility's 2026 CPO Benchmark Study found.

People are training instead of hiring



ProcureAbility



Aard Verbeek, chief procurement officer of Schneider Electric, gave an example of the skill gap during DPW Amsterdam 2026. When AI surfaced large savings, buyers rejected them as the output of a "dumb system" that lacked context. Only when the reasoning was shown, and buyers were asked to teach the engine how to classify spend, did they accept the results. The bottleneck was not the technology. It was the human skill of understanding and explaining the decision.

WHY THIS WILL SHAPE 2027

2027's best buyers know their category, question AI, and sell the decision.

In 2027, the most valuable procurement professional combines deep category expertise with the judgment to read what AI produces, challenge it, and sell the decision to a stakeholder. Judgment only stays sharp when it is used on real decisions.

ACTIONS YOU SHOULD TAKE

Form your view before AI forms it for you.

- [ ] **Decide which skills your team keeps in-house, whatever AI can do:**

  Negotiation, stakeholder management, supplier judgment, and the ability to question an AI conclusion. These are the core of a procurement professional's job. Then assess the team against those skills and close the gaps.

- [ ] **Mark the decisions where the team must think first.**

  For sourcing strategy, supplier selection, and escalations, have people form their own view before they see the AI recommendation; otherwise their judgment fades while AI does the analysis.

- [ ] **Form your own view before you open the AI recommendation on your next sourcing decision.**

  Write down where the two differ.

TREND 5

Trust becomes the infrastructure for procurement

AI can do the analysis, but it has no empathy. Closing a deal, keeping a supplier on your side when it has to choose whom to deliver, and winning over internal stakeholders are soft skills, and in 2027 they decide more, not less.

Trust in procurement has always been built the slow way: how you treat suppliers, how fairly you run a tender, whether the business believes you when you say a deal is good. AI does not change that. It makes it more important, because the analysis, the benchmark and the first draft of the contract now come out of a model that every competitor can buy too. What the model cannot do is read the person across the table, hear the need behind a supplier's position, or notice that a relationship is quietly cooling.

Empathy is the procurement skill AI lacks, and it is the one that closes deals and keeps supplier relationships alive.

The test comes when supply is short. A supplier that can deliver either you or your competitor delivers the customer it trusts: when capacity is tight, or a line is down, the buyer who knows the supplier gets helped first. That preference is built over years of behavior, not in the tender: paying on time, sharing a forecast, picking up the phone before an escalation, and treating a problem as something to solve together rather than a clause to enforce. It is why 61% of chief procurement officers rank closer information sharing and collaboration with suppliers among their top risk strategies, and 57% name siloed ways of working as the biggest barrier to delivering value, according to Deloitte's 2025 Global CPO Survey.

TOP RISK STRATEGY

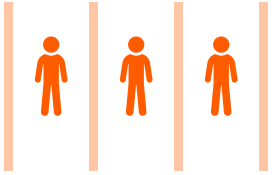
61% of CPOs rank closer supplier collaboration a top risk strategy



BIGGEST BARRIER TO VALUE

57%

of CPOs say siloed ways of working hold them back the most



The same applies inside the company. Stakeholders bring procurement in late when they do not trust it to help: 43% of procurement leaders name late engagement by the business as the biggest barrier to value, ProcureAbility found.

In our supplier relationship management work with procurement teams, three skills come up every time, and they form a chain:

01 **Empathic Listening**

Hearing the need behind the ask instead of forming your reply while the other side is still talking

02 **Accountability**

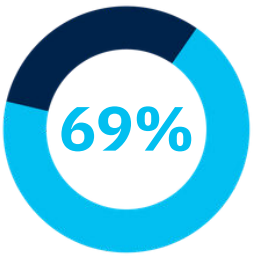
Holding yourself and your counterpart to clear, mutual commitments

03 **Conflict Resolution**

Reading tension early and moving a tough conversation toward an outcome both sides can live with.

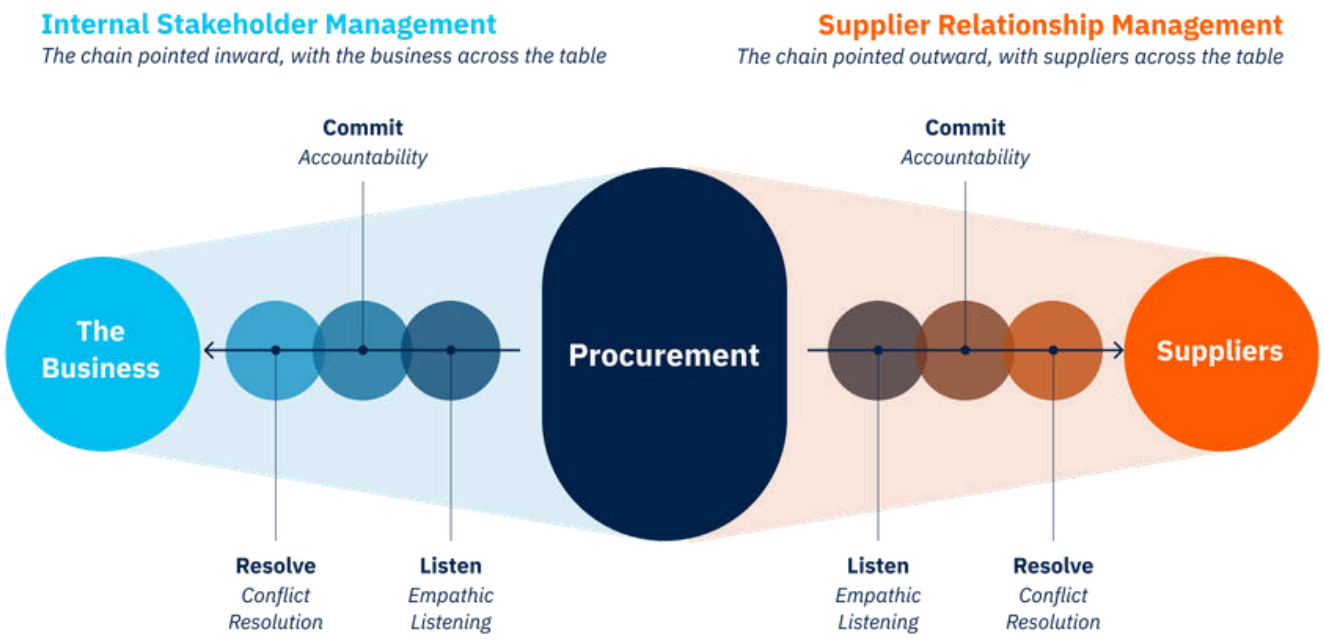
You can only hold someone accountable once you understand what is going on for them, and an accountable relationship is what makes conflict solvable.

Internal stakeholder management is the same chain pointed inward, with the business instead of the supplier on the other side of the table. And when a decision does come out of a model, the person on the other side still wants a person to explain it:



of B2B buyers prefer to validate AI-generated insights with a person before they decide, Gartner found.

Your suppliers are those buyers' sales teams; they will expect the same from you.



WHY THIS WILL SHAPE 2027

In 2027, every procurement team has the same AI.

What sets one apart is whether its suppliers and stakeholders would choose it: the negotiator who listens, the relationship owner the supplier calls first, and the buyer who takes accountability and resolves conflict without a script.

ACTIONS YOU SHOULD TAKE

Form your view before AI forms it for you.

- [ ] **Decide which suppliers must choose you when supply is short, and invest in those relationships before you need them:**

  Pay on time, share your forecast, and give them a named owner and a second contact on both sides. A supplier that trusts you delivers you first; no contract clause buys that.

- [ ] **Make empathy a negotiation skill, not a personality trait. Hire, train, and promote on the three skills that close deals and keep suppliers on your side:**

  Empathic listening, hearing the need behind the supplier's position before you answer; accountability, both sides owning clear, mutual commitments; and conflict resolution, handling a missed delivery or price dispute early without damaging a relationship you cannot replace.

- [ ] **Run internal stakeholders the way you run strategic suppliers.**

  Agree up front what each side owns, hold yourself to it before you hold them to it, and address conflict when budget, timing, and risk pull apart, before it surfaces as a late request procurement has to block. Stakeholders bring procurement in early when they trust it.

TREND 6

The race to capture organizational knowledge begins

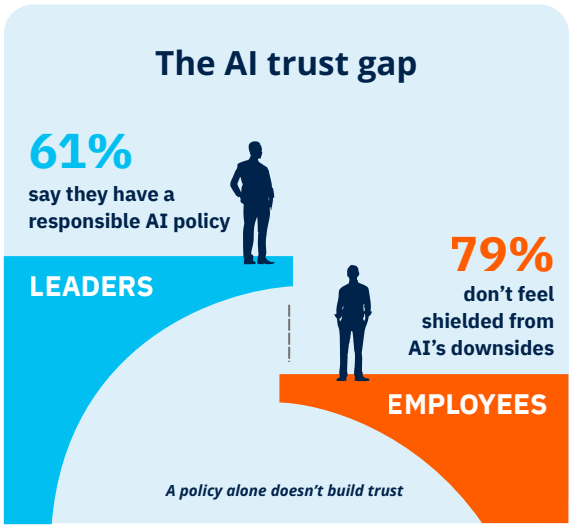
Every competitor has the same AI models. The edge is the supplier knowledge in your senior buyers' heads, and the race to capture that knowledge and make it transferable has started.

Knowledge management is not new. What is new is that the knowledge can now be fed to a model, and that every competitor has access to the same models. What they do not have is your supplier history, your category quirks, the reason a tender failed in 2023, or the clause your best buyer always insists on with a particular supplier. Most of that knowledge was built in supplier relationships, over years of negotiations, escalations and site visits, which is why it leaves with the person who holds the relationship.

Saurabh Gupta of HFS Research said it plainly during DPW Amsterdam 2026: frontier models "are just giving you the internet, they don't know your company." The challenge is that most of this knowledge sits in people's heads rather than in a system. Experienced buyers know why a supplier relationship really works, which exceptions matter, and what they would never do with a given supplier. Capturing that is the first hurdle. Trust is the second: the company wants buyers to share knowledge built over years, while buyers wonder what happens to their own role once they do.

Off-the-shelf agents rarely unlock strategic advantage, McKinsey points out, because the agents that matter have to be aligned with the company's own logic, data and knowledge.

That knowledge is where procurement's edge will come from in 2027.



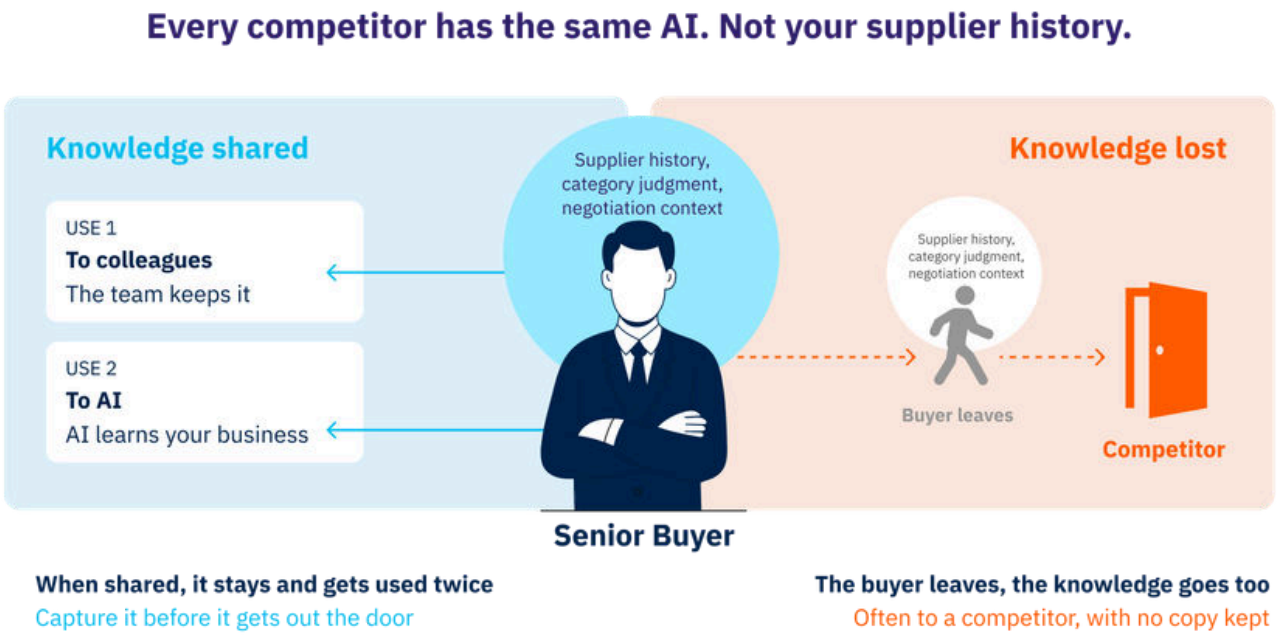
Catalyst

The gap is wide: 61% of leaders say their organization has a responsible AI policy, yet 79% of employees disagree that leaders adopt AI in ways that minimize the negative impact on them, Catalyst found.

The pressure comes from the senior end of the team. 54% of C-suite leaders see talent scarcity as the top force shaping their people plans, Mercer's Global Talent Trends 2026 found.

Senior buyers who leave take the category with them, and as trend 7 shows, fewer juniors are coming up behind them to inherit it.

When that knowledge walks to a competitor, there is rarely a system that kept a copy.



WHY THIS WILL SHAPE 2027

Losing knowledge when a senior leaves is an old problem, but what is new in 2027 is that this knowledge now has a second use:

it turns a generic AI model into one that understands your suppliers and categories. Lose a senior procurement professional without a handover, and you lose both the category knowledge and the training your AI will never get, and you will spend 2028 rebuilding it.

ACTIONS YOU SHOULD TAKE

Secure the knowledge before it walks out the door.

- [ ] **Know what knowledge you can't afford to lose.**

  Identify the knowledge that gives procurement its edge, the supplier history, category judgment, and negotiation context held by a few experienced people, and treat losing it as a business risk.

- [ ] **Decide how you keep those people and how you make what they know transferable.**

  Both are needed: a retention plan for the people, and a structured handover of their knowledge into systems the team and AI tools can use. One without the other leaves you exposed.

- [ ] **Tell the team what they get in return for sharing what they know, and make it visible.**

  Knowledge capture fails when people suspect it is the first step toward replacing them.

TREND 7

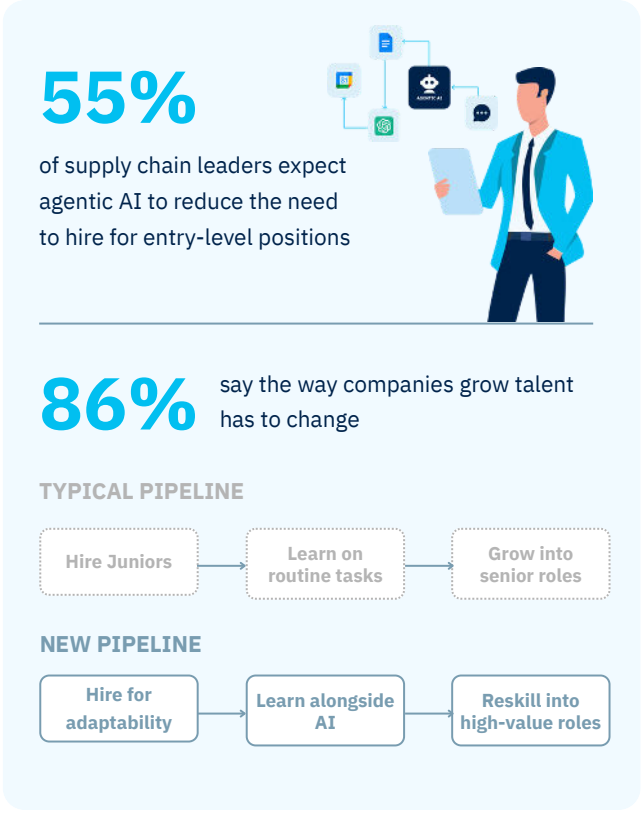
AI is hollowing out entry-level procurement work

AI removes the routine tasks juniors learned on, while the remaining entry-level roles demand more experience. Without a junior path, the category managers of 2030 will be scarce and expensive.

The tasks a junior buyer used to start with, spend analysis, supplier data gathering, drafting RFP documents, chasing approvals, are exactly the tasks AI handles best. They follow a process and can be checked against a standard. Danone's tail-spend desk in trend 2 is the procurement version: tactical buying and purchase-to-pay work, where juniors used to start, is the first to be digitized. So companies hire fewer juniors, and the problem stays invisible for a while.

Employment of 22- to 25-year-olds in AI-exposed occupations in the US now stands 19% below where it would be had it kept pace with their less exposed peers, Stanford's Digital Economy Lab found in its revised 2026 study. The pattern is American in the data and global in the mechanism.

Procurement is squarely in scope. 55% of supply chain leaders expect agentic AI to reduce the need to hire for entry-level positions, and 86% say it will require new talent pipeline processes, Gartner's global survey found. The junior jobs that remain demand more: companies are removing the foundational work while expecting juniors to arrive ready for work that used to come five years into a career.



Gartner

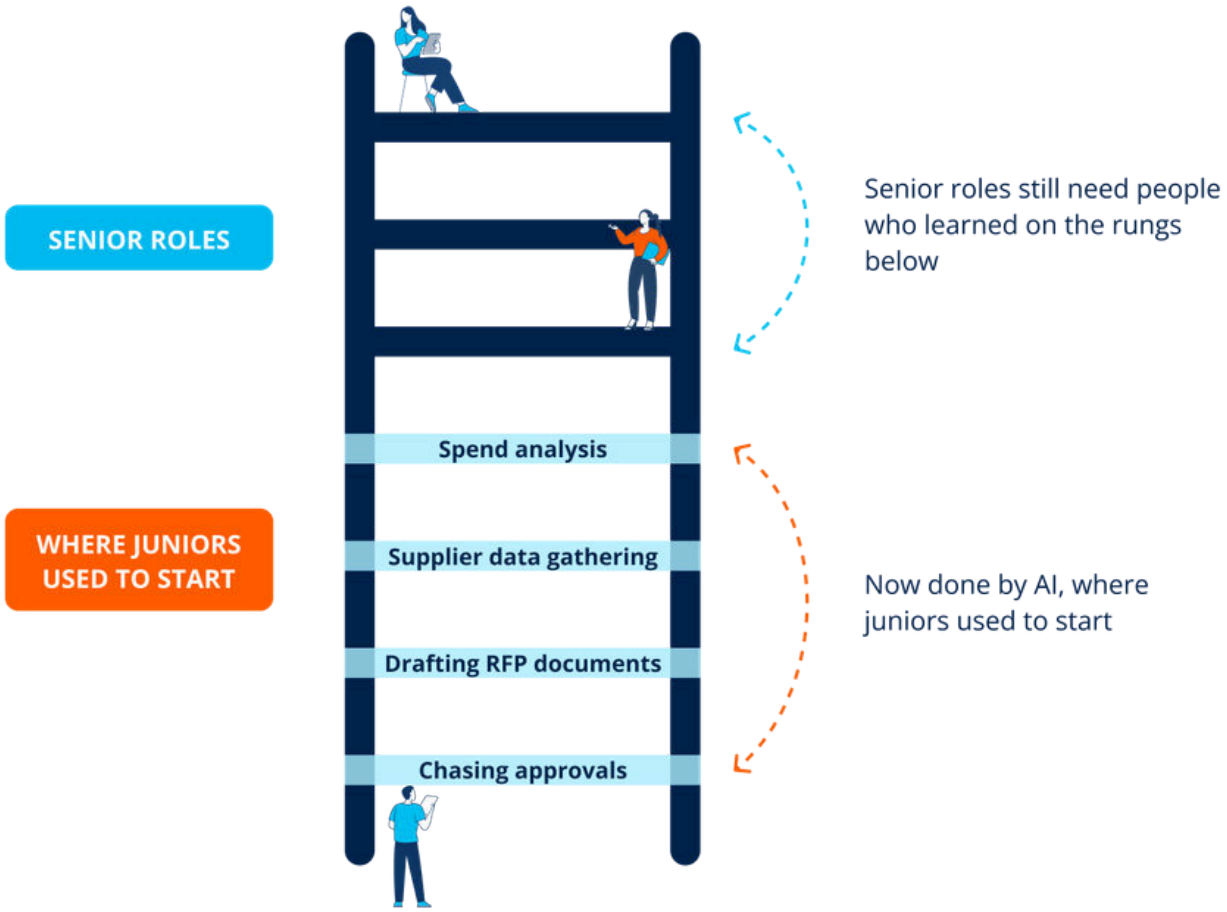
The real cost is developmental. Entry-level work gave people repeated, low-stakes practice: running a small tender, spotting an odd quote, watching a senior buyer handle a difficult supplier. That is also where the soft skills were learned: how to negotiate, how to say no to a stakeholder, how to keep a supplier on side after a hard conversation. Procurement is rarely taught as a degree, so most of the basics are learned on the job, and that makes onboarding the whole succession plan.

Whether a junior becomes the category manager of 2030 depends on three things:

01 **How well they learn to use AI**

02 **How they are trained on the basics no university taught them**

03 **How much time they get with experienced buyers to pick up the skills that are never written down**



Gartner predicts, and it is a prediction, that by 2030, 75% of supply chain organizations that paused entry-level hiring in 2026 will pay premiums upward of 15% for early-career professionals. Matt Everett of Regeneron pushed back on the gloom during DPW Amsterdam 2026: "the entry-level jobs of yesterday go away, but the entry-level jobs of tomorrow will be very different."

WHY THIS WILL SHAPE 2027

This is a 2027 decision with a long fuse.

Nothing breaks next year, which is exactly why it is easy to postpone. The bill arrives later: the experienced buyers you did not grow will have to be bought on the market, at a premium, if they can be found at all.

ACTIONS YOU SHOULD TAKE

Grow your juniors before the pipeline runs dry.

- [ ] **Keep hiring juniors, even when AI makes it unnecessary in the short term.**

  Treat the entry-level program as an investment in succession, not a cost; the category managers of 2030 have to come from somewhere.

- [ ] **Decide what an entry-level job looks like now.**

  Choose whether juniors start on live categories with supplier contact and coaching, or on supervising AI agents. Then set the experience bar and pay to match the real role, and build the onboarding around three things: training on the basics, learning to use AI well, and structured time with experienced buyers.

- [ ] **Take a junior with you into your next supplier negotiation and your next difficult escalation.**

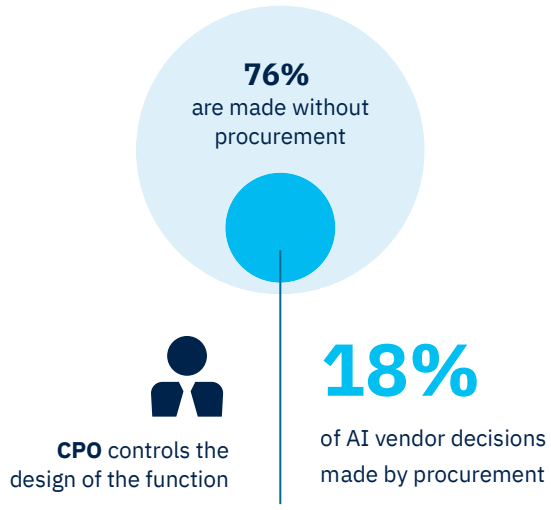
  The work AI removed was how they learned; the work you still do is where they learn now.

TREND 8

CPO leads procurement evolution towards stronger business integration

AI is redrawing the procurement function: smaller core teams, buyers embedded in the business and new roles that run AI agents. The CPO owns that design and brings the supply-side view to the company's decisions.

Most AI decisions are still made without procurement in the room. Saurabh Gupta of HFS Research said during DPW Amsterdam 2026 that only 18% of procurement teams own the AI vendor decision, and 76% of AI decisions are made without procurement. What the CPO does control is the design of the function itself, and that is where the evidence says the work is: companies are organizing procurement around end-to-end flows instead of departments, with buyers placed inside the business and new roles such as the person who manages a set of AI agents.

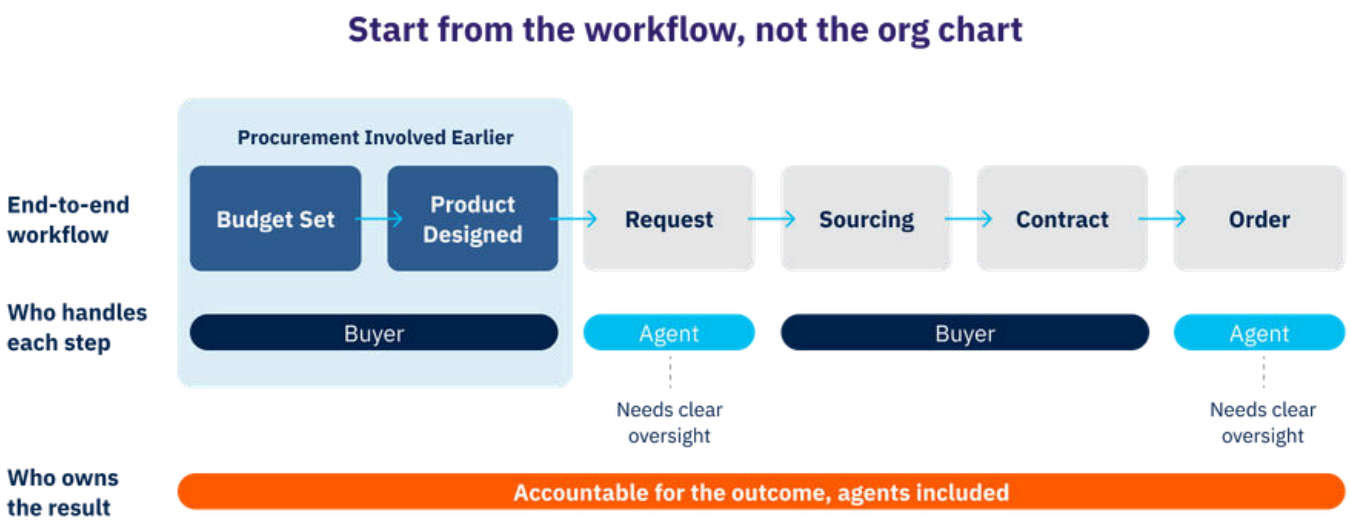


The seat is getting closer to the top. One in three procurement leaders now report directly to the chief executive, managing director or owner, up from 15% a year earlier, CIPS reports. The expectations rise with it: The Hackett Group projects procurement workloads to grow 8% in 2026 while headcount and operating budgets decline.

More is asked of the function with fewer people, which is why the design of the work matters more than the next tool.

This is why Gartner warns that procurement operating models "have not evolved quickly enough to reflect the impact of GenAI on existing roles."

The redesign is already visible. Laura Cook of Primark described during the same DPW event



growing a central procurement excellence team from one person to a quarter of the function, and JLL and Mercedes-Benz (trend 3) have written the human and agent roles into their operating model. The CPO's contribution to the company's AI and organization decisions is the supply-side view: which categories change, which suppliers carry the risk, and what the company can still buy if the plan goes ahead.

WHY THIS WILL SHAPE 2027

In 2027, the CPO's influence grows while the team gets smaller.

Draw the new function yourself, or inherit a design somebody else drew, and that someone will have looked at it as a cost line, not as a capability.

ACTIONS YOU SHOULD TAKE

Shape the role before someone else does.

- [ ] **Bring the supply-side view to the AI, technology, and organization design conversations the CPO is now part of:**

  which categories will change, which suppliers carry the risk, and what the company can still buy if the plan goes ahead. Being in the room is the start, not the result.

- [ ] **Sketch the procurement function of 2027:**

  Which roles stay in the core team, which buyers move into the business, which roles are new (such as managing a set of AI agents), and what procurement will never give up: category strategy, supplier relationships, and the knowledge of how the company buys. Give the new roles a development path, so people can grow into them instead of being moved into them.

- [ ] **Map your own role against that sketch:**

  Which of your tasks an agent will run, which you will check, and which only you can do. Then ask for the role you want before it is designed for you.

THEME

03

Procurement's role in an unstable world economy

Outside the AI story, the world is not getting calmer. These four trends cover what instability does to security of supply, where companies buy, how many suppliers they keep and how closely they work with them, and why compliance now comes before sustainability.

TRENDS IN THIS THEME

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Security of supply first
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Supply chains move: from globalization to regional resilience
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Supplier consolidation intensifies
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Trend # 12:
Compliance overtakes sustainability
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TREND 9

Security of supply first

Tariffs, energy and metal prices, export controls and shipping routes change faster than contracts. Security of supply moves ahead of cost as procurement's first question.

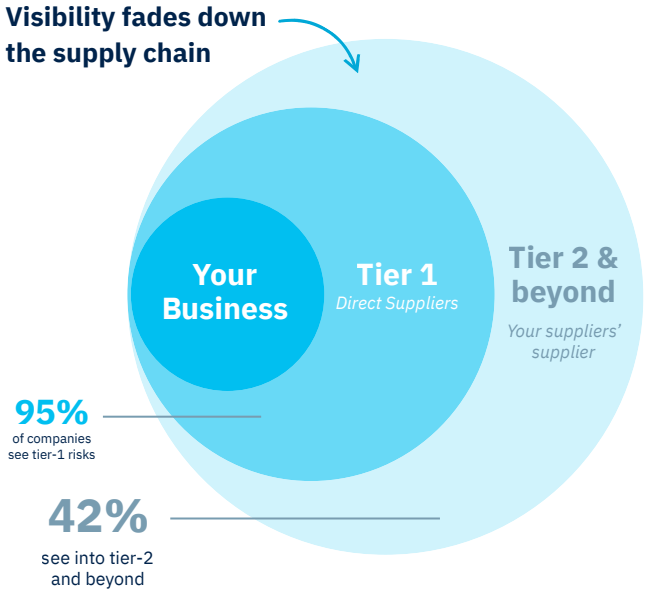
None of these shocks is new on its own. What is new is that they arrive together and keep arriving. Prices for base metals such as aluminum, copper and tin rose by a third between January 2025 and April 2026, lithium prices more than doubled, and the number of mineral tariff codes subject to Chinese export controls has tripled since 2023, the IEA reports.

For a European manufacturer, energy belongs on the same list: a power price that moves with the next pipeline or the next conflict is an input cost no contract clause fully absorbs.

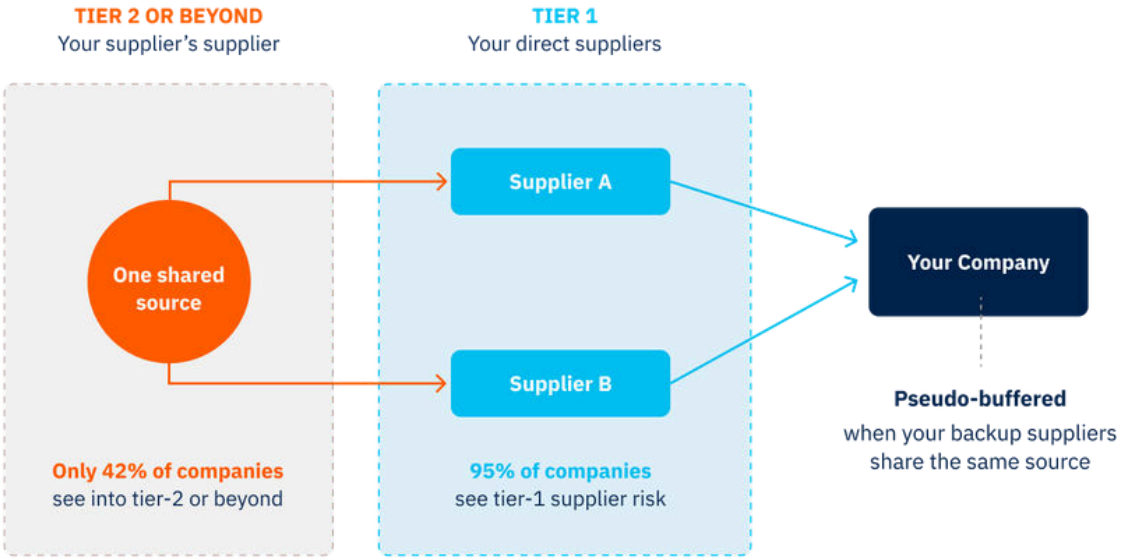
Tariffs have stopped being an event and become an operating condition. In 2026 alone, US tariff policy rested on three different legal bases: emergency powers struck down by the courts, a temporary surcharge, and then a Section 301 forced-labor regime covering 60 economies, as Kroll describes.

Whether it shows up as a tariff, an energy bill, or a metal price, the cause is the same: conditions that change faster than contracts.

Visibility has not kept up with the risk. 95% of companies now have visibility into tier-1 supplier risks, but only 42% see into tier 2 or beyond, McKinsey found.



Dual-sourced on paper, single-sourced in practice



WHY THIS WILL SHAPE 2027

In 2027, the board asks procurement one question before any other:

Will we get our materials, and at what price? Business continuity is at stake, and taking risk in the company's core lifeline is a risk few can afford. Continuity has a price of its own, usually in stock, and the CFO will want it per category.

ACTIONS YOU SHOULD TAKE

Choose cost or continuity before the next shock chooses for you.

- [ ] **Set the strategic priority per category for 2027, cost or continuity, and tell the business.**

  The two priorities lead to different suppliers, different contracts and different inventory, and a team that has not chosen will be asked for both.

- [ ] **Decide how much price volatility to carry and how much to pass on.**

  Choose where index clauses, shorter price validity, and tariff pass-through belong in contracts, and where the company takes on the risk in exchange for security of supply.

- [ ] **Ask your three most critical suppliers where they buy from, and whether their alternatives share a source.**

  You do not need a visibility platform to find out whether your second source is only a second source on paper; you need three conversations, and a supplier relationship good enough that they answer honestly.

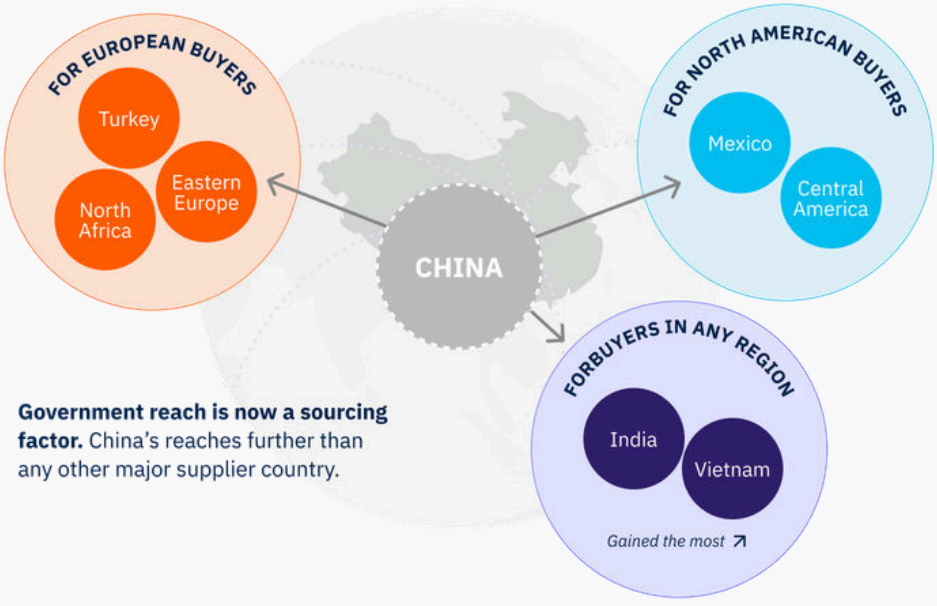
TREND 10

Supply chains move: from globalization to regional resilience

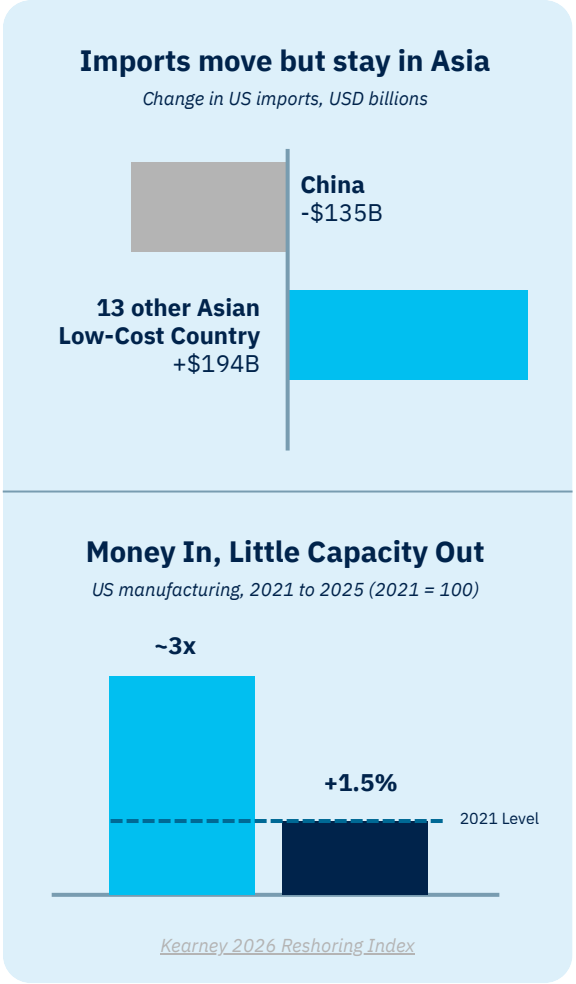
Sourcing shifts away from China, and not only for cost or continuity: tariffs, technology restrictions and the reach of the Chinese state push companies toward other Asian countries, aligned partners and regions closer to their customers.

Companies are shifting sourcing away from China toward other Asian countries, Mexico and nearby regions, partly to avoid tariffs and partly to stop depending on a single geography. Continuity, covered in trend 9, is only part of the reason. Export controls on technology run in both directions: the Chinese government reaches further into its companies' data and decisions than any other large supplier country, and companies fear being cut off from critical technology or having their own exposed.

A move from China to Vietnam does not bring supply closer to the customer, but it does take it out of one government's reach, and for many boards that is the point. For a European buyer, the nearby options are Turkey, Eastern Europe, and North Africa; for a North American buyer, they are Mexico and Central America; for everyone, India and Vietnam are the Asian alternatives that gained most. The focus has moved from globalization to regional resilience.



The data shows a rewiring rather than the reshoring that was promised. Kearney's 2026 Reshoring Index remains negative: 13 other Asian low-cost countries gained 194 billion USD of US imports while China lost 135 billion USD, and US manufacturing capacity grew only about 1.5% between 2021 and 2025 while investment roughly tripled.



McKinsey Global Institute estimates that more than 165 billion USD of trade has been pushed away from the US-China corridor. Production did not come home. It moved to the next country over, and for many companies the China footprint stayed, serving China.

Intent is everywhere; execution is early. 80% of chief operating officers plan to increase onshoring or nearshoring while only 2% say they have fully implemented their strategy, Bain found. The gap between the plan and reality is where procurement earns its seat, because qualifying a new supplier in a new country is a multi-year supplier development program, not a tender, and the landed cost difference decides whether it is worth it.



80%
of COOs plan to increase onshoring or nearshoring

only 2%
have fully implemented their strategy

Aard Verbeek of Schneider Electric argued during DPW Amsterdam 2026 that "it is not companies competing with companies anymore, it is supplier ecosystems competing with supplier ecosystems," and described building a supplier campus next to its own plant to put key suppliers next door. That is supplier relationship management as a sourcing strategy: the region you buy from matters less than how closely you work with the suppliers in it.

WHY THIS WILL SHAPE 2027

In 2027, the sourcing map follows the customer map and the border map.

Nothing breaks next year, which is exactly why it is easy to postpone. The bill arrives later: the experienced buyers you did not grow will have to be bought on the market, at a premium, if they can be found at all.

ACTIONS YOU SHOULD TAKE

Plan the move before you have to make it.

- [ ] **Define what resilience means**

  Define for each critical category what resilience means for your company, whether that is spreading supply across regions, a second source close by, or holding stock. Write the policy down; most teams have none and improvise at every disruption.

- [ ] **Treat dual sourcing as a program, not a tender**

  Treat dual sourcing from a country alongside China as a multi-year supplier development program, not a one-time sourcing event, and resource it that way.

- [ ] **Know the landed cost before anyone asks**

  Calculate the landed cost of your top category from the two most likely alternative countries, tariffs, freight, and lead time included, before anyone asks. The business will ask in 2027, and the buyer with the number decides the discussion.

TREND 11

Supplier consolidation intensifies

Procurement teams want fewer suppliers for the same delivery, managed deeply, but never only one. Consolidation is only half the trend; the other half is stronger supplier relationships, with partnership, tier-2 visibility, and a qualified second source.

Trends 9 and 10 argue for a second source. This trend argues for fewer suppliers. Both are true, and the way to hold them together is simple: fewer suppliers, but never only one.

Companies are consolidating to a smaller number of suppliers they can really manage, and investing in deeper integration and collaboration with the ones that remain, while keeping a qualified alternative for anything that would stop production.

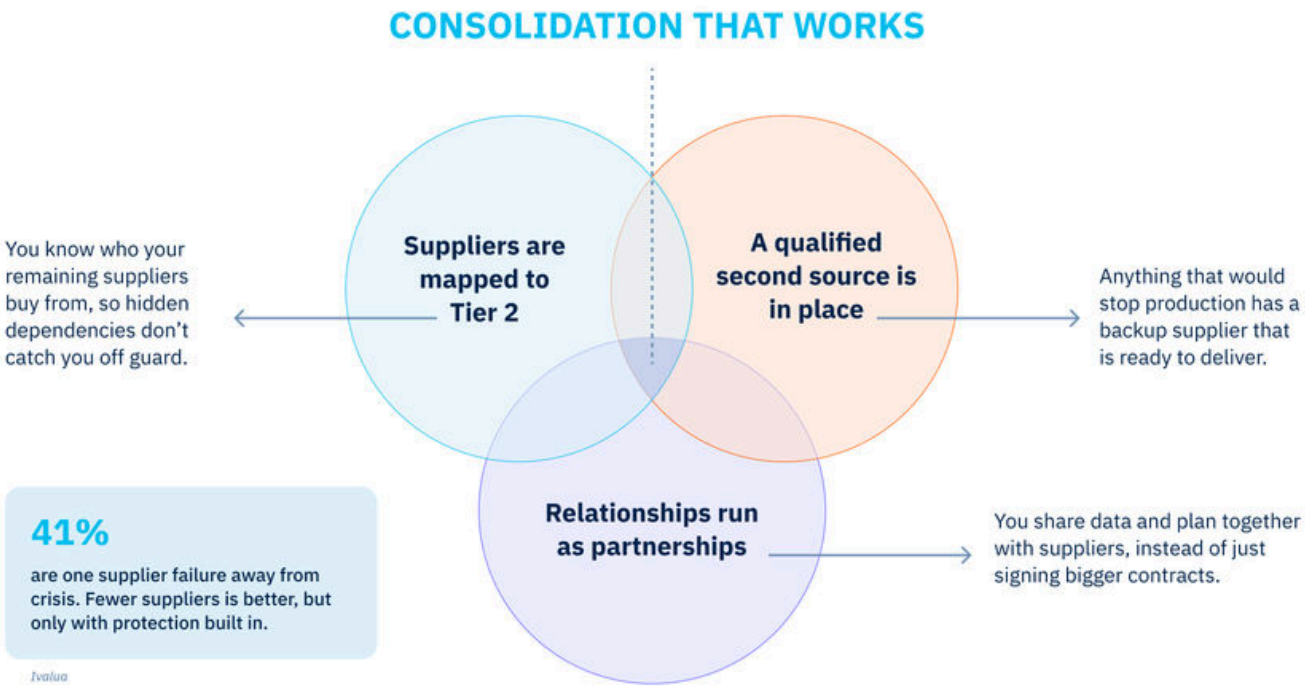
The point is not a shorter supplier list. It is a stronger relationship with every supplier left on it: shared forecasts, joint cost and risk reviews, early involvement in product decisions, and an executive sponsor on both sides. You cannot develop, monitor, and innovate with 90 suppliers, but you can with nine.

The numbers point the same way. Organizations now work with an average of 83 MRO suppliers, down from 92 a year earlier, the RS 2026 Indirect Procurement Report produced with CIPS found. That is one sector, and the move is bigger in direct materials, where a strategic supplier now brings engineering, capacity and risk sharing that a long tail of small vendors cannot.

Top risk strategies for CPOs



64% of chief procurement officers rank greater visibility into the supply chain, and 61% closer collaboration with suppliers, among their top risk strategies, Deloitte's 2025 Global CPO Survey found; both are only possible with a supplier base small enough to know, and with suppliers who trust you enough to share their numbers. Depth is where the value is, and concentration is where the risk is. 41% of procurement and supply chain leaders say they are one supplier failure away from a supply chain crisis, Ivalua found.That is exactly why consolidation only works when the remaining suppliers are mapped to tier 2, when a qualified second source stays alive for the items that would stop production, and when the relationship is run as a partnership with shared data and joint planning, not just a bigger contract.



WHY THIS WILL SHAPE 2027

In 2027, supplier management becomes the skill that separates procurement teams.

A consolidated supply base frees up time to run real partnerships, and supplier relationship management, not the tender, becomes the core skill of the category manager; consolidate and then manage the remaining suppliers the old way, and you have simply bet more on fewer.

ACTIONS YOU SHOULD TAKE

Build the partnerships before you shorten the list.

- [ ] **Let capacity set the number**

  Work out how many suppliers procurement can actually manage per category, and let that number, not the tender, drive consolidation. A handful of suppliers that perform beats a long list that does not.

- [ ] **Name your partners and what they get**

  Name your strategic partners and what the company offers them in return, such as volume commitments, shared forecasts, or joint innovation. Partnership without something back is just a bigger contract, and consolidation without partnership is just a shorter list.

- [ ] **Cap the risk before you cut**

  Cap the concentration risk the consolidated supplier base may carry, and mark where a qualified second source is non-negotiable, before you move the smaller suppliers out. For your own category, start with the one item that would stop production.

TREND 12

Compliance overtakes sustainability

Compliance now takes more of procurement's time than sustainability. Traceability, forced labor, deforestation, and carbon border rules come with dates, fines, and blocked shipments.

Sustainability has not gone away. It has become enforceable, and in doing so it has stopped being a topic companies compete on and become a set of requirements they comply with. In a study of 75 firms reported by Harvard Business Review, only 13% had retreated from sustainability, and 85% held steady or accelerated, often while muting their messaging. The work has moved from the strategy deck into supplier contracts, and procurement is carrying it.

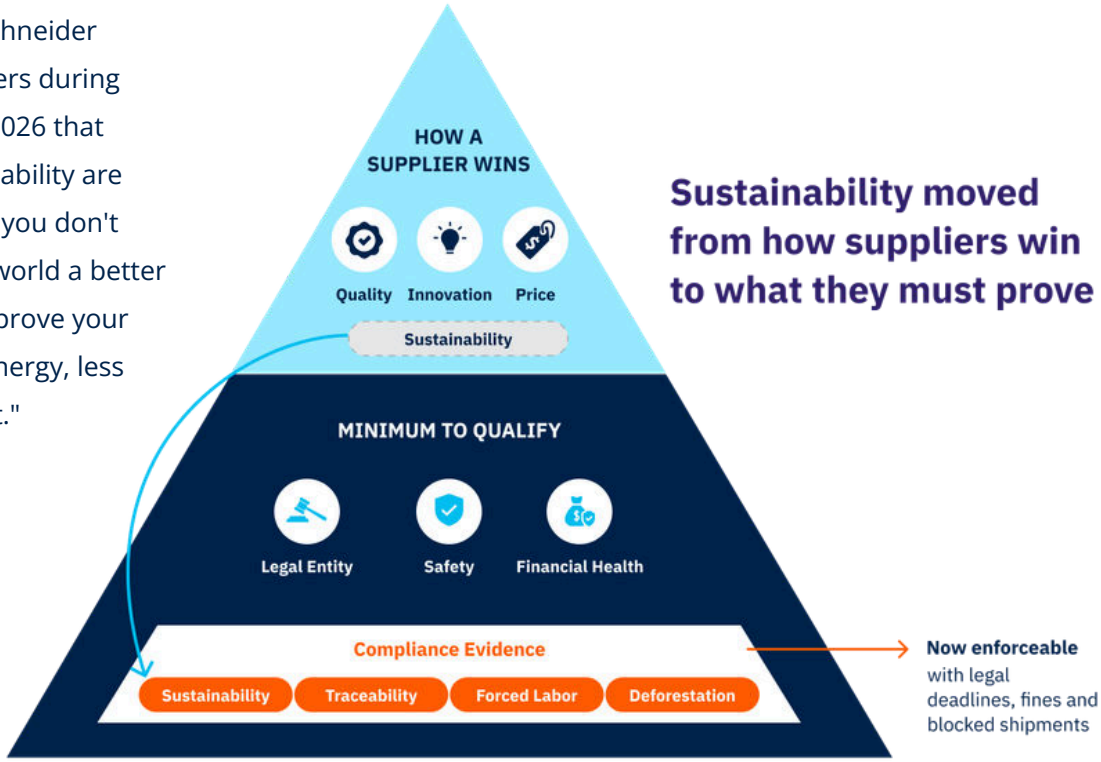
The rules are global, and fewer of them does not mean lighter. In the EU, the Omnibus directive took most companies out of sustainability reporting, but the rules that remain are the ones with dates and penalties: due diligence on deforestation, a carbon price on imported steel, aluminum and cement, and a ban on products made with forced labor, with the first of these applying from the end of 2026 and the others following in 2027. The US already bars goods linked to forced labor in Xinjiang and has added tariffs on the same grounds, and Germany and the UK require due diligence and public statements from larger companies.

The details differ by country and keep moving, which is exactly the point: every one of these rules asks procurement for the same thing, proof of where a product came from and how it was made, and that proof lives in the supplier data you hold.

Missing it means fines and blocked shipments, not a bad score in a sustainability rating.

That data is thin. Suppliers' upstream Scope 3 emissions are on average 21 times a company's own Scope 1 and 2 emissions, yet only 8% of companies have set targets to reduce them, and companies that engage their suppliers are nine times more likely to set and deliver one, BCG and EcoVadis found. Compliance data comes from suppliers, and suppliers share it with buyers they trust; this is relationship work before it is reporting work.

Aard Verbeek of Schneider Electric told suppliers during DPW Amsterdam 2026 that quality and sustainability are non-negotiable: "if you don't want to make the world a better place, then just improve your bottom line: less energy, less fossil fuel, less cost."



WHY THIS WILL SHAPE 2027

In 2027, compliance wins the fight for procurement's time, because the obligations now come with dates, penalties, and blocked shipments.

A penalty ceiling of at least 4% of EU turnover gets a CFO's attention in a way a target never did.

ACTIONS YOU SHOULD TAKE

Get the supplier data before the deadline asks for it.

- [ ] **Run compliance as a program**

  Run compliance as the priority it has become: a program with dates, owners and penalties, resourced ahead of sustainability ambitions. The obligations landing in 2027 do not care about messaging.

- [ ] **Mark the decisions where the team must think first.**

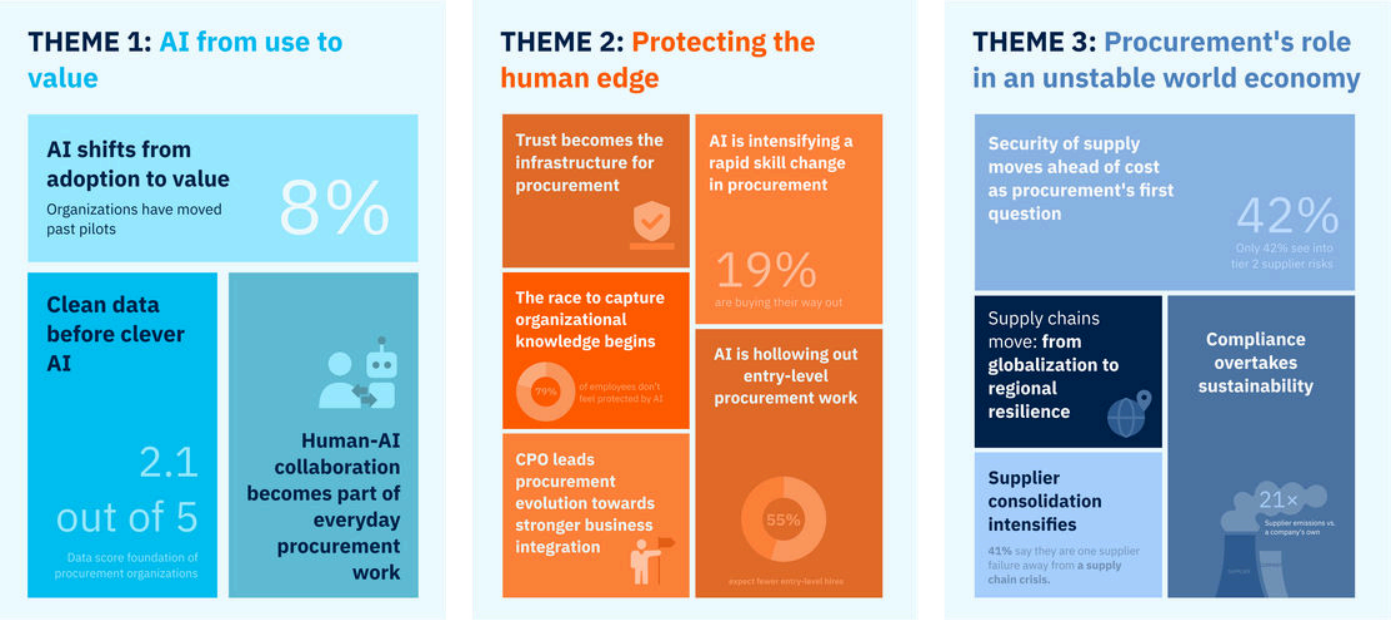
  Move sustainability requirements into supplier contracts as measurable clauses rather than leaving them in codes of conduct. Only the first can be enforced when a shipment is blocked.

- [ ] **Build one supplier data model that serves every regulation (traceability, emissions, forced labor) instead of a separate project for each law.**

  In your own category, start by asking each supplier once for the data all four rules need, not four times.

You know the trends. Your turn to make the choices.

These 12 trends do not describe a single technology story. They describe a function trying to catch up in a world where AI is evolving faster than the org chart, where the business asks more of procurement without giving it more people, and where the world economy hands procurement a bigger job than cost.



None of this resolves on its own. The procurement organizations that pull ahead in 2027 will be the ones that make deliberate choices about how work, people, suppliers, and data need to change, and that make them early. Redesign the work around AI.

Protect the judgment, the trust and the knowledge of your people, and the supplier relationships they built. Secure supply before you chase the next saving. Bring the supply-side view into the business's decisions before they are made. Procurement will not solve these challenges alone, but it sits at the center of all of them. 2027 is the year procurement either claims that position or cedes it.

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We work with procurement professionals across industries and roles all year. This report was written by the people leading that work.



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About Procurement Tactics

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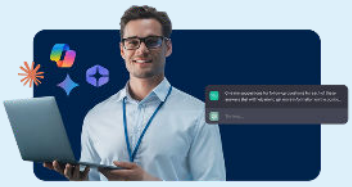
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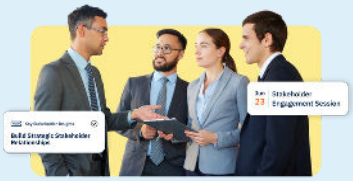
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Procurement Trends 2027

Thank you!

At Procurement Tactics, we believe AI makes procurement skills more valuable, not less. The teams that pull ahead in 2027 will be the ones that build the judgement, trust, and knowledge no tool can copy.

If you'd like to learn more about our programs, explore our platform, or discuss how we can help your team prepare for the trends in this report, we'd love to stay in touch.

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