



accenture
Digital Supply
Chain/Edge Study

February 2026





What You Will Learn:

1. Why Digital Supply Chain Now: Context & Urgency
2. What Enterprises Are Trying to Fix
3. What's Actually Working: Proof of Value from Current Investments
4. What's Holding Back Digital Supply Chain Progress
5. What Changes Next: 2027 Outlook & Market Implications
6. Key Takeaway

Why Digital Supply Chain Now: Context & Urgency

Digital supply chain edge has become a core operating capability, not a technology initiative

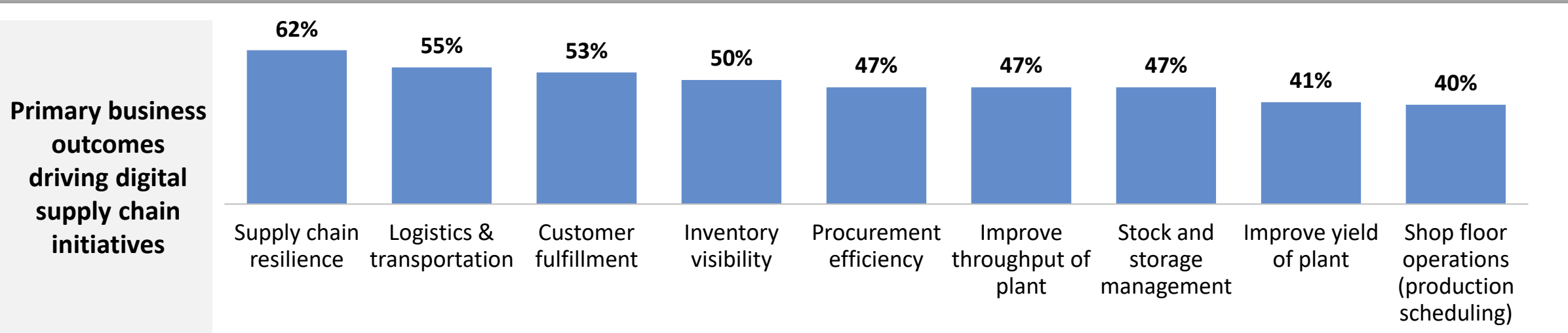
Measure	Average (Trimmed Mean)
Number of SKUs	42,000
Inventory Value	\$690M
Number of Suppliers	2,200
Number of Direct Customers	3,800
Employees Supporting Digital Supply Chain	220

- Large enterprises are managing extreme supply chain complexity – 40K+ SKUs, ~\$690M in inventory, and 2K+ suppliers making traditional supply chain models insufficient.
- Complexity of supply chain, not revenue, now drives investment priorities, buying behavior, and vendor choices.
- CEOs, COOs and operations leaders now drive digital supply chain initiatives and experiments, with IT in a supporting role.
- The conversation has shifted from experimentation to enterprise-scale value delivery, but execution is struggling to keep pace with complexity.

What Enterprises Are Trying to Fix

Supply chain resilience is the top improvement priority across all levels of complexity.

Efficiency remains important but it is no longer sufficient. Visibility, fulfillment, and resilience now define supply chain performance.



Priorities Shift With Complexity (High vs. Low Complexity Enterprises)

Higher Complexity
(50K+ SKUs, 10K+ suppliers/customers, \$1B+ inventory)

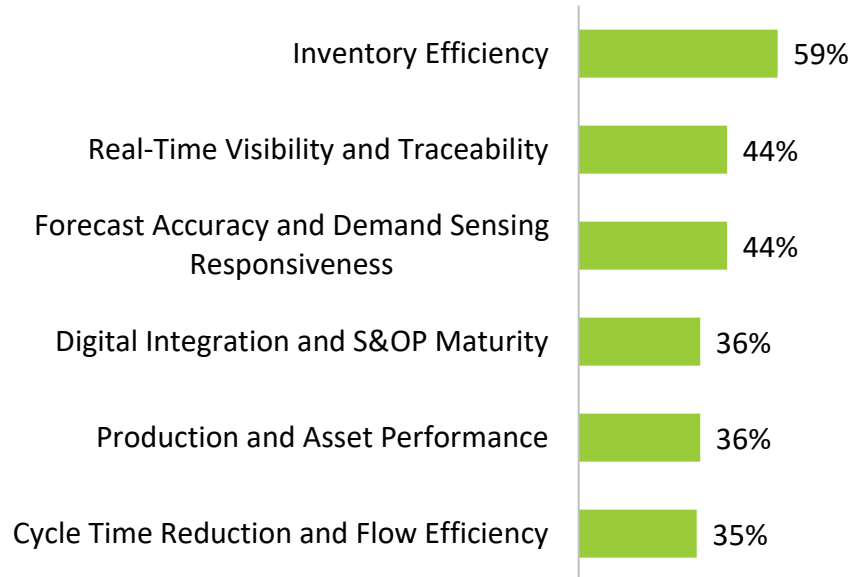
- Supply chain resilience
- Customer fulfillment
- Inventory visibility
- Plant throughput

Lower Complexity
(<2K SKUs, <100 suppliers/customers, <\$50M inventory)

- Logistics & transportation
- Asset utilization/uptime
- Procurement efficiency
- Stock & storage management

What's Actually Working: Proof of Value from Current Investments

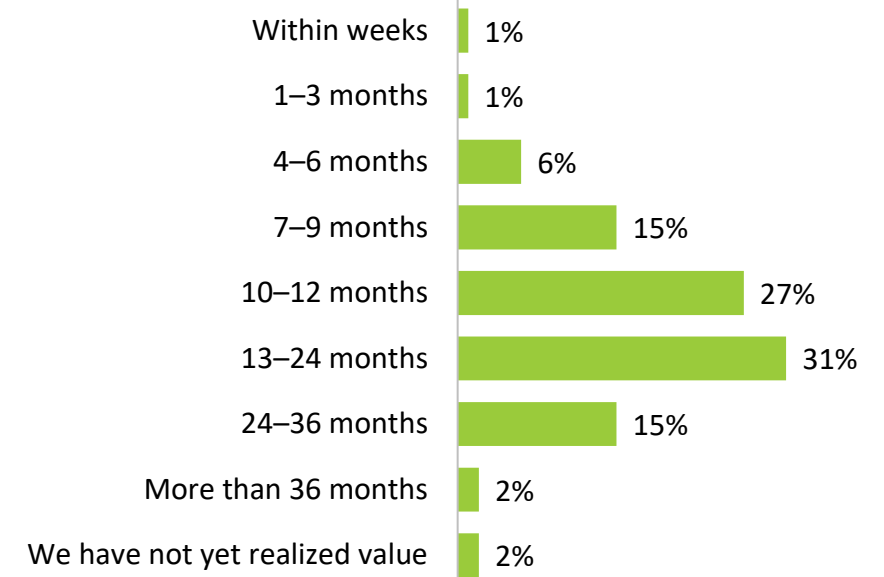
Fastest Improving Metrics



Where Organizations See Strong Success

- Forecast accuracy
- Production throughput & flexibility
- Asset utilization & uptime
- Supply chain resilience
- Process & product quality

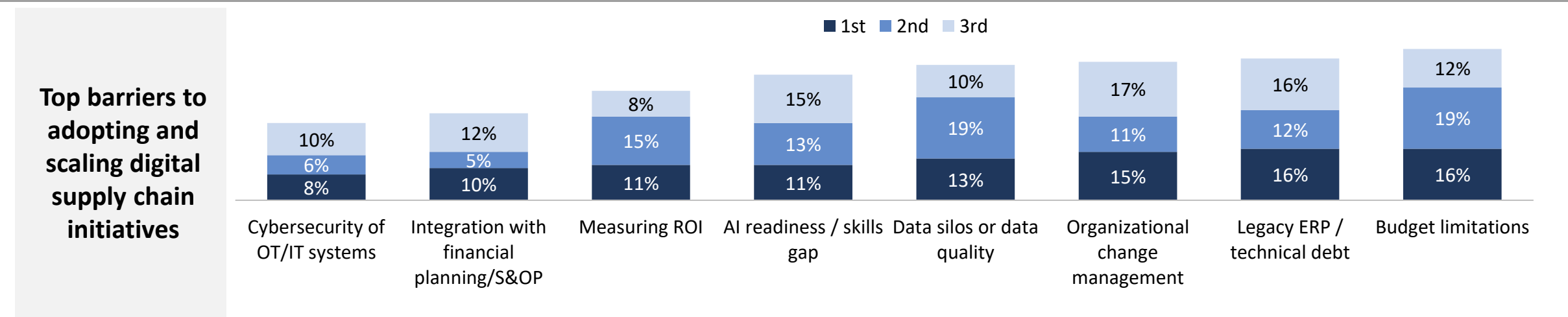
Time to Value



- Digital supply chain investments are delivering measurable operational improvements, particularly in **planning accuracy, inventory efficiency, and real-time visibility**.
- **Time to Value** -> within **12 to 18 months**; <12 months for lower-complexity organizations; ~18 months for large, complex enterprises
- Gains are real, but success is often partial, and full rollout still takes time, especially in complex environments.

What's Holding Back Digital Supply Chain Progress

Budget constraints, legacy ERP, data silos, and change management, not technology gaps, are the primary constraints on scaling digital supply chains. Low data maturity and confidence continue to limit impact, particularly for real-time visibility, risk detection, and sustainability.



Challenges Shift With Complexity (High vs. Low Complexity Enterprises)

Higher Complexity
(50K+ SKUs, 10K+ suppliers/customers, \$1B+ inventory)

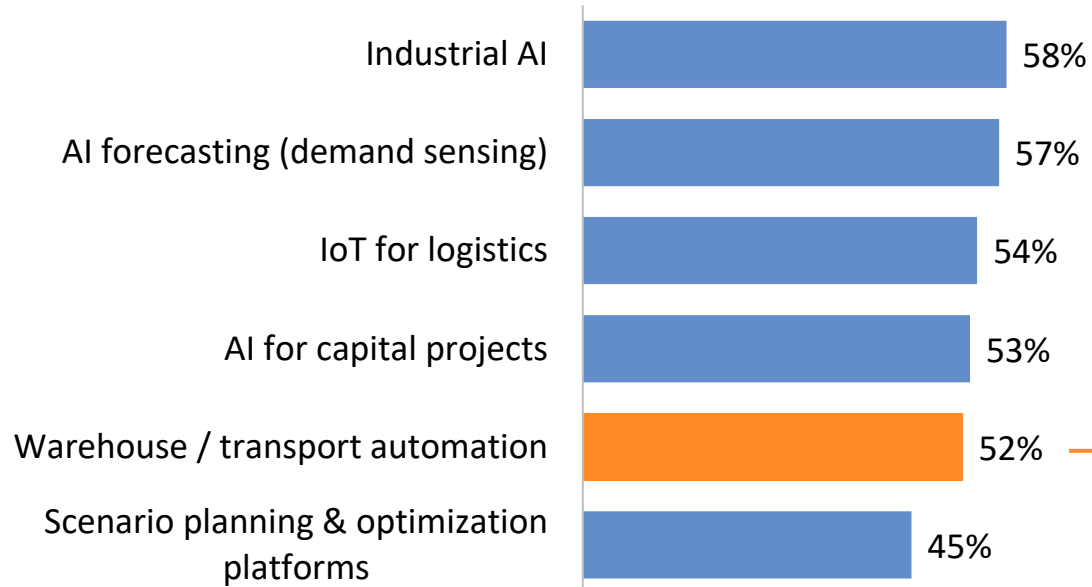
- Legacy ERP/technical debt
- Organizational change management
- Data silos & data quality
- AI readiness/skills gap

Lower Complexity
(<2K SKUs, <100 suppliers/customers, <\$50M inventory)

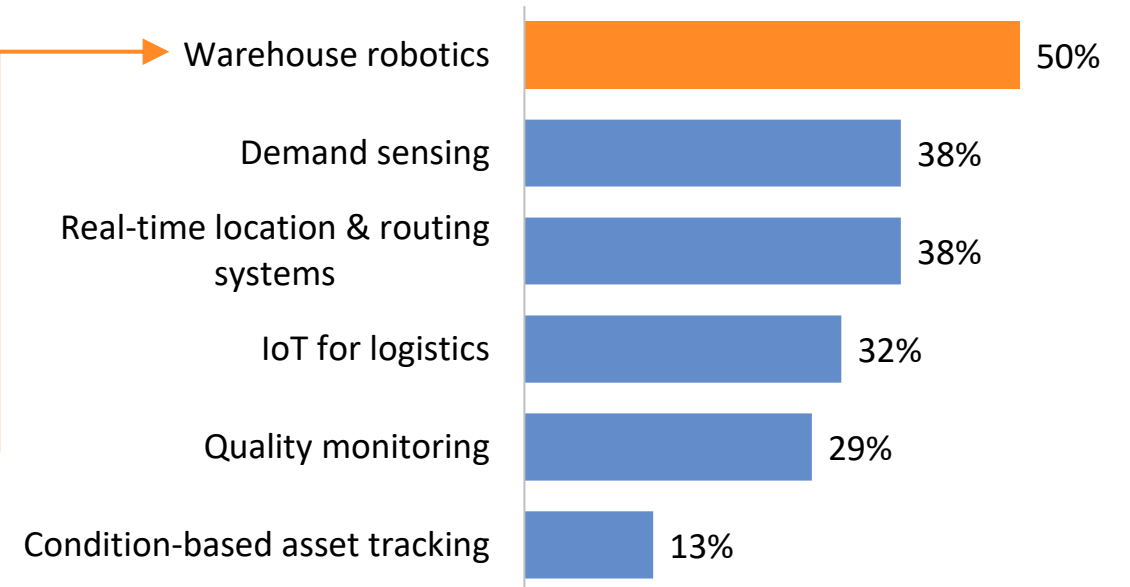
- Budget limitations
- Measuring ROI
- AI readiness/skills gap
- Data silos & data quality

What Changes Next: 2027 Outlook & Market Implications

Where Investment Is Increasing (by 2027)



Highest Value Initiatives



Investment, Value, and Outcomes Are Converging
Enterprises are funding the same technologies they believe will deliver the greatest value

Proven, Operational Technologies Lead Investment
Applied AI, automation, and real-time visibility receive higher priority than experimental technologies

Key Takeaways



Digital Supply Chain Edge Is Now Core Operating Capability

Digital supply chain edge capabilities have become foundational to how manufacturers plan, execute, and compete.

Resilience Has Surpassed Efficiency as the Primary Investment Driver

While cost and throughput remain important resilience, visibility, and fulfillment anchor investment decisions.

Enterprises Are Seeing Operational Gains, but Struggling to Scale Strategic Impact

Organizations are achieving measurable improvements, but few have scaled to enterprise-wide impact.

Complexity, not Technology, Dictates Time to Value

SKU count, network scale, and inventory intensity has a greater impact on timelines and outcomes than access to digital tools.

The Biggest Barriers Are Organizational and Data-Driven

Change management, data maturity, and legacy environments, not technology availability, limit progress.

The Next Phase Moves from Visibility to Decision Intelligence

Leaders are focusing on analytics, AI, and scenario-driven decision-making to unlock the next wave of value



Appendix

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Digital Supply Chain Study – Sample Snapshot



N.America – Europe:
50/50 Split

>1000 employees,
Mostly multi-national

Median: \$3B revenue,
9,000 employees



N=100:
Digital Supply Chain
Decision Makers*

C-Level 66%
(COO, CEO, CSO, CTO, etc.)

Manufacturing Operations
20%



Manufacturing Industries

Industrial Manufacturing - 30%

CPG - 12%

Automotive - 11%

High Tech - 11%

Food and Beverage - 8%

Chemicals - 7%

Etc.



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