

Forecasting 2026: What's Next for Supply Chain

Unpacking the biggest trends shaping supply chain in 2026

LUNCH AND LEARN

Thursday, January 8, 2026 | 12pm ET

Thank you for attending!



Featuring
Chris Gaffney

Related Upcoming Course Series
scl.gatech.edu/genai

See the course details pages
for upcoming session dates



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Webinar Expectations

What this session is

- Grounded in macroeconomic and geopolitical signals
- Informed by published outlooks from trusted institutions
- Interpreted through observed supply chain behavior
- Oriented toward decisions and actions, not predictions

What this session is not

- A single forecast
- A technology showcase
- A promise of certainty in an uncertain world

The core challenge entering 2026

How do supply chain leaders make good decisions when signals are mixed, pressure is constant, and timing matters more than precision?



Start With Learning: 2025 Forecasts vs. Reality

What many forecasts got directionally right

- Margin pressure persisted
- Inflation eased unevenly
- Global recovery remained fragmented
- Capital discipline outlasted expectations

What was off

- Speed and scale of AI productivity impact
- Depth of consumer pessimism versus actual spending
- Degree of regional divergence within the U.S.

Why Forecasts Miss

Common causes of forecast error

Timing errors rather than directional errors

Underestimating how firms adapt under pressure

Confusing sentiment with actual behavior

Translating macro signals too literally into operations

Key takeaway

Most forecasting failures are interpretation failures, not data failures.



The Economic Engine

Four primary drivers

1 Consumers

2 Businesses

3 Government

4 Trade

Why this matters for supply chains

- Each responds differently to uncertainty
- Demand does not disappear — it shifts
- Small changes amplify upstream

Spending Behavior: Reality Check

Consumers

- More resilient than sentiment suggested
- Spending shifted by category and channel
- Price sensitivity increased at the margin

Businesses

- Deferred large, irreversible bets
- Invested selectively in productivity and resilience

Government

- More targeted, conditional spending
- Stronger emphasis on execution, industry participation, and workforce outcomes

Macro Forces That Still Matter in 2026



Geopolitical tension and conflict spillovers



Trade and industrial policy



Immigration pressure and demographic shifts



Capital costs higher than the 2010s baseline

These are not new forces — but their persistence matters.



What Is **Genuinely New or Heightened** in 2026



Election-driven policy uncertainty



Greater risk of decision delay



Higher expectations tied to public funding



Pressure to demonstrate tangible AI value

How Firms Are Responding (Observed Patterns)

Public companies (dominant tendencies)

- Protecting margins aggressively
- Applying sustained productivity pressure
- Risk of efficiency crowding out robustness

Private and mid-market firms

- Longer planning horizons
- Targeted hiring
- Selective, cautious AI adoption

Competition Is Inexorable

Competition is simultaneously:

Local

Regional

Global

Implication

Waiting for clarity is itself a strategic choice — and often a costly one.



Structural Shifts: Real, but Slow



Reshoring and nearshoring



Energy transition



Vehicle and mobility shifts

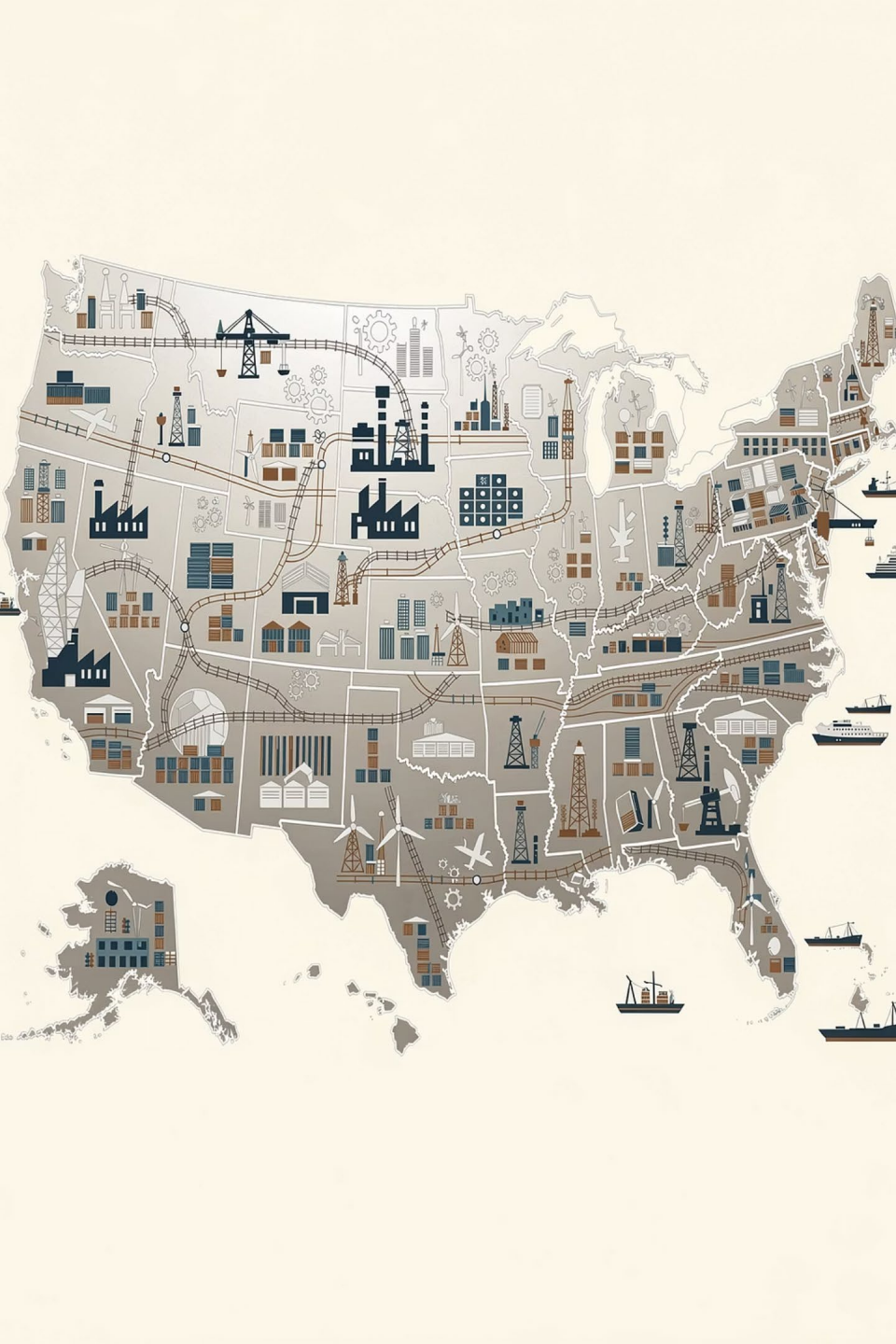


AI-enabled planning and execution

2026 reality: This is a year for capability building, not payoff harvesting.



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The U.S. Supply Economy: Diverse and Uneven

**Structural diversity drives
resilience**

**Performance varies
meaningfully by region**

"Lumps" are signals, not failures



Individuals as Consumers and Workers

- Real pressure exists
- Perceived pressure often exceeds reality
- Even modest consumer shifts matter because supply chains amplify signals

Personal bias check: pessimism often exceeds outcomes.



AI: 2026 as the Proof Year

What we know

- Adoption \neq productivity
- Pilots \neq scale
- Governance and trust now matter

What works

- AI accelerating analysis, development, and insight
- Humans retaining judgment, trade-offs, and accountability



2026 Outlook: Ranges, Not Point Forecasts

Topic	Pessimistic	Nominal	Optimistic
Demand	Below trend	Modest, uneven	Above-trend pockets
Costs	Sticky	Gradual easing	Faster normalization
Labor	Tight	Slight easing	Meaningful relief
Capital	Higher-for-longer	Gradual easing	Faster easing
Trade	Fragmented	Stable rerouting	Selective recovery
Geopolitics	Escalation	Elevated	Partial relief
Energy & Freight	Volatile	Stable w/ spikes	Predictable
AI Impact	Limited	Targeted gains	Broader leverage

Bottom-Line Supply Chain Predictions for 2026

Our synthesis

- 1 Cost and productivity pressure persist**
- 2 Adaptation outperforms optimization**
- 3 AI separates curiosity from capability**
- 4 Supply chains become more regional, not simpler**
- 5 People and change capability determine outcomes**

Curve Balls and Black Swans

Curve balls

- Policy or trade shocks
- Financial market repricing
- Cyber or infrastructure disruptions

True black swans

- Systemic technology failure or misuse
- Severe climate or geopolitical shock



Core principle

Not planning for events — planning for recognition and response speed.

Why Adaptive Capacity Matters

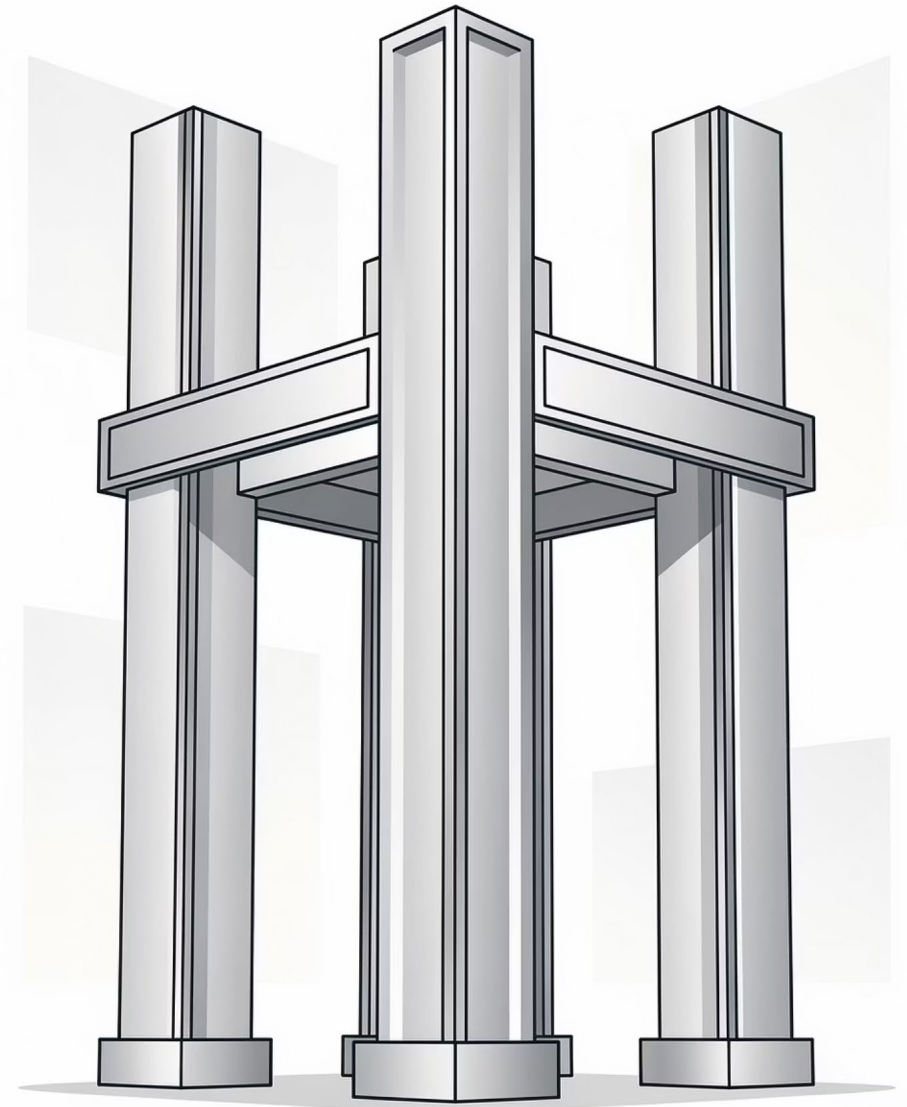
The *real risk* entering 2026:

Not being wrong about the future — but being slow to adapt when reality diverges from the plan.

The 2026 SCL Action Frame

Four Actions That Compound Advantage

1. Increase output without burning out
2. Use AI to strengthen judgment
3. Make better decisions by thinking further ahead
4. Lead change and capability — not just projects



Increase Output Without Burning Out



Why this matters

Growth without hiring is now an operating assumption



What to do

- Remove low-value work
- Use AI and analytics to reclaim time
- Focus on leverage, not activity



Guardrail

Productivity gains must come from capability – not exhaustion.



ACTION PILLAR 2

Use AI to Strengthen Judgment, Not Replace It

High-probability use cases

- AI to build and monitor analytics
- AI to surface drift, inconsistencies, and options
- Humans approve and decide



Design principle

Human-in-the-loop is not a concession — it is a stabilizer.

ACTION PILLAR 3

Make Better Decisions by Thinking Further Ahead



Explicit assumptions



Second-order consequences



Clear articulation of trade-offs

Most failures are alignment failures, not math failures.

ACTION PILLAR 4

Lead Change and Capability, Not Just Projects

What differentiates durable success



Change management treated as core work



Visible progress shared and reinforced



Employees who feel more capable, not threatened



Reflection (2–3 Minutes)

Consider:

“

Where did we feel the most discomfort recently?

”

“

What lesson did we say we learned – but didn't institutionalize?

”

“

What decision are we postponing right now?

”

What This Means for 2026 Actions

Focus less on

- Perfect forecasts
- Big bets everywhere
- Autonomous decisions without trust

Focus more on

- Enterprise productivity first
- Human-in-the-loop analytics
- Decision readiness
- Visible progress

The most valuable capability in 2026?

The ability to absorb signals and act before clarity arrives.

What Winning Looks Like by End of 2026



**Tangible productivity
improvements**



**Faster movement from idea to
implementation**



**Better discipline around
assumptions**



Stronger trust across teams



**Employees who feel more capable, not more
threatened**

Durability — not novelty — defines advantage.



What To Do About This Next Monday

Turning Insight into Action (Without Overreacting)

Pick **ONE** of the following — not all three:

1. A Decision to Revisit

- Identify one upcoming or recent decision that assumed stability
- Ask: "What would change this decision in 90 days?"
- Make the assumptions explicit — and assign ownership

Why this matters: Most bad outcomes come from unexamined assumptions, not bad intent.

2. A Capability to Assess

- Choose one capability that matters under uncertainty (e.g., resilience, planning discipline, data quality, change readiness)
- Ask: "How confident are we really?"
- Identify one weak signal you've been ignoring

Why this matters: Capabilities degrade quietly if they are not exercised.

3. A 90-Day Experiment to Run

- Pick one low-risk, high-learning experiment (AI-assisted workflow, planning assumption refresh, cross-functional review)
- Define:
 - What success looks like
 - What you will stop if it doesn't work
- Share the outcome visibly

Why this matters: Learning velocity beats perfect planning.

The goal is not to be right next Monday. The goal is to be better prepared by the next quarter.

Thank You

Discussion



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Upcoming NextGen Courses

Transforming Supply Chain Management and Performance Analysis

Feb 23, 2026 – Feb 26, 2025 | Virtual (Instructor-led)

Category Management and Sourcing Leadership

March 2, 2026 - March 4, 2026 | Virtual (Instructor-led)

Generative AI Application for Supply Chain Professionals

March 23, 2026 - March 25, 2026 | Virtual (Instructor-led)



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Upcoming SCL Lunch and Learn Opportunities

Ahead of the Curve: Emergency Logistics

w/ Dr. Mathieu Dahan

Thursday, February 5th | 12-1pm ET | Zoom Registration Link



scl.gatech.edu/feb26-lnl



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