

# 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!



Related Upcoming Course Series  
[scl.gatech.edu/genai](http://scl.gatech.edu/genai)

See the course details pages  
for upcoming session dates



Featuring  
**Chris Gaffney**



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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



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# 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.



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# 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



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# 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



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# 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.**



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# 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



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# 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



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# 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 ≠ productivity
- Pilots ≠ scale
- Governance and trust now matter

## What works

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



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# 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.**

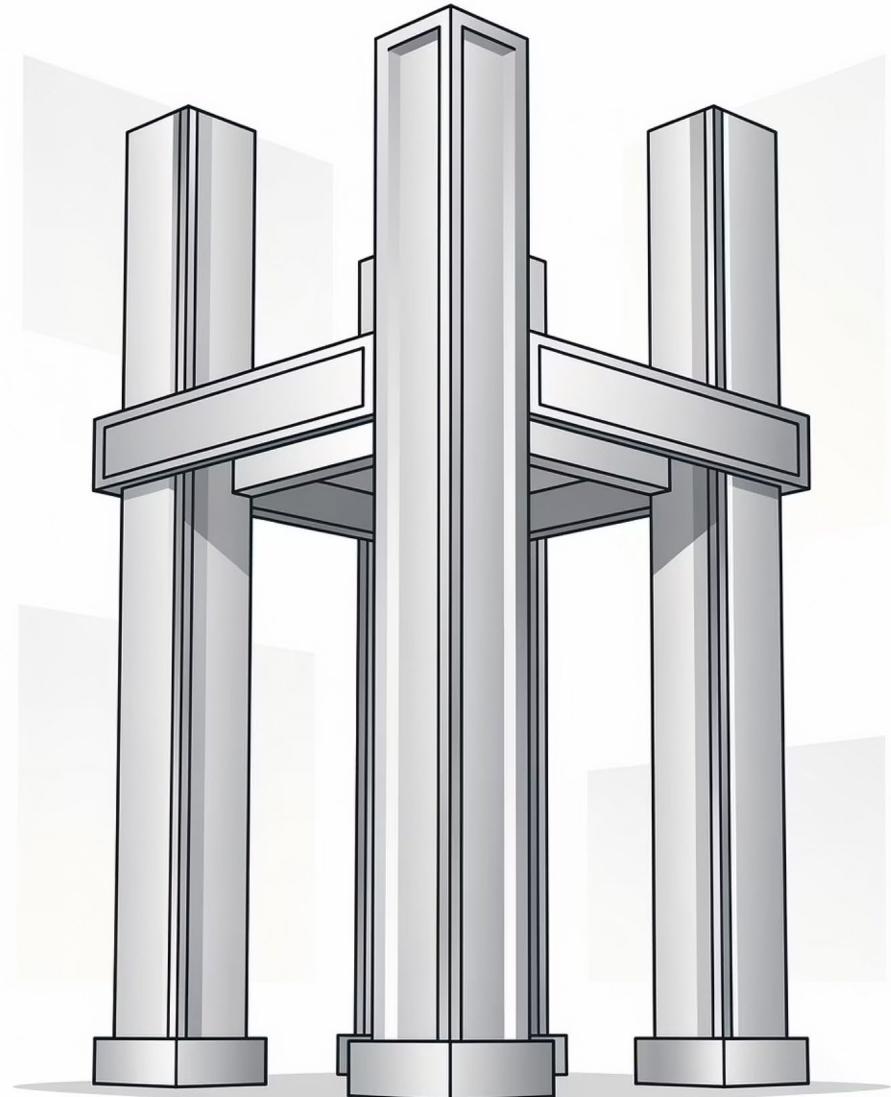


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# The 2026 SCL Action Frame

## 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



**ACTION PILLAR 1**

# 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.



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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.



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**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**



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# 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



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# **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.

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**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 5<sup>th</sup> | 12-1pm ET | Zoom Registration Link**



**[scl.gatech.edu/feb26-lnl](https://scl.gatech.edu/feb26-lnl)**



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