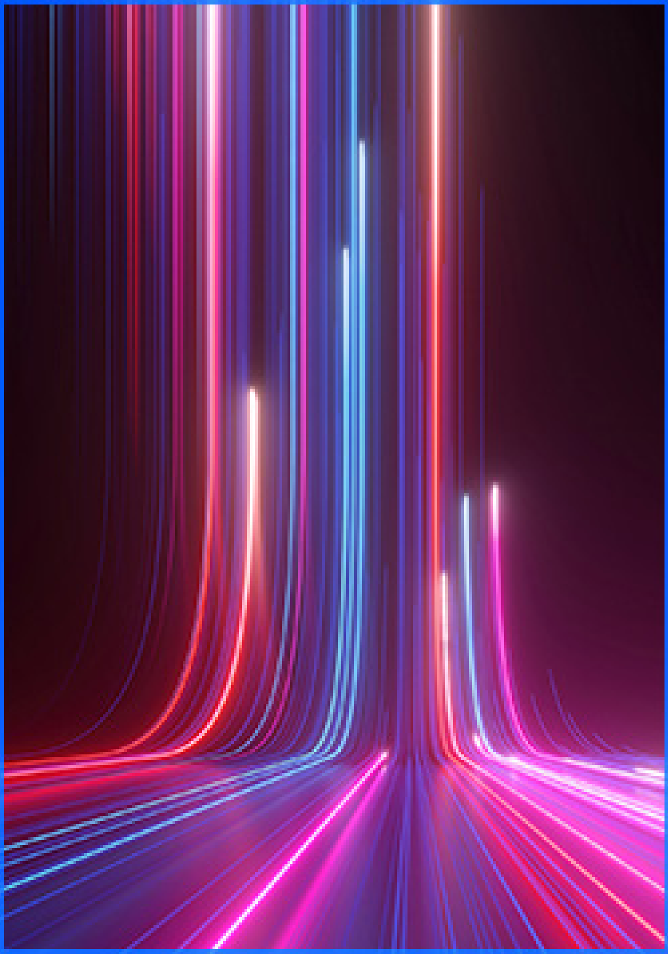
KPMG

KPMG 2026 US Supply Chain Survey

Built for speed, tested by risk

Supply chain priorities in technology, media, and telecom

New survey finds leaders are focused on meeting rising risk with modernized operating models and more agile, connected supply chains.



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Supply chain risk moves up the agenda for technology, media, and telecom

Ask supply chain leaders in technology, media, and telecommunications what matters most right now, and the answer is resoundingly consistent: managing the rising levels of risk on multiple fronts and building operations resilient enough to absorb them.

That's among the key insights from the 2026 KPMG US Supply Chain Survey, which gathered responses from more than 50 senior supply chain leaders in each of these three sectors. The commitment to strengthening risk and resilience functions runs across our survey, backed by plans to modernize operating models and scale up AI and automation to close critical capabilities gaps. The expanding risk matrix is challenging each industry in unique ways, with supplier-network exposure topping the technology agenda, regulatory pressure leading in telecommunications, and supplier fragility and shortages weighing heaviest in media.

Beyond risk, leaders across these sectors are also moving on several other critical fronts:

Transformation has shifted from launch to execution.

A majority of leaders in each sector plan comprehensive changes to the supply chain operating model the next phase of modernization efforts already in motion at many companies.

The talent gap is severe across the board.

Roughly 8 in 10 leaders in each sector report a supply chain talent gap, spanning functions from demand planning to visibility to fulfillment.

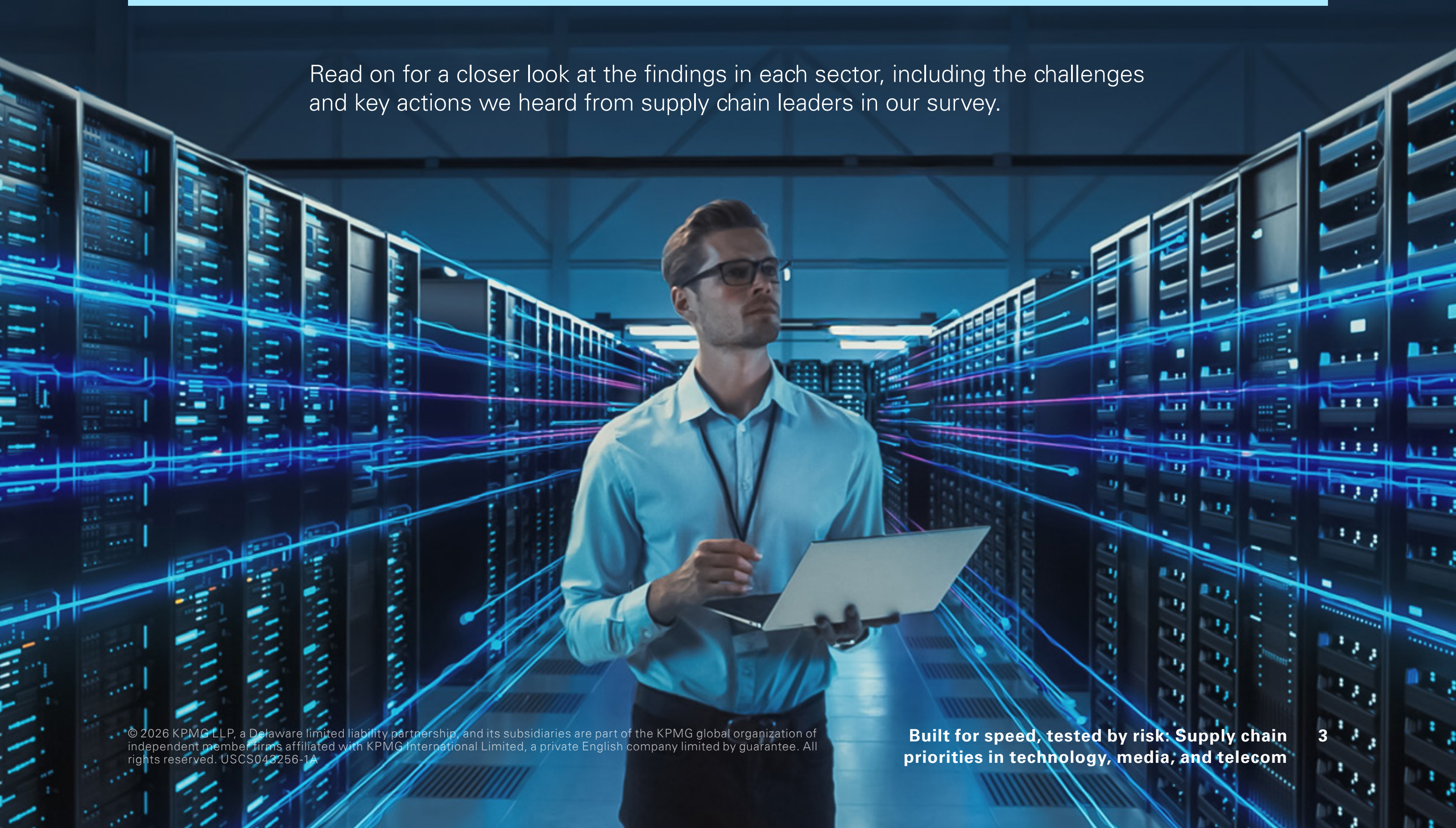
AI is reshaping the workforce.

Strong majorities in each sector anticipate AI significantly transforming supply chain roles even amid indications that the work of building the data and process foundations beneath it continues.

92%

of supply chain leaders across the technology, media, and telecommunications industries are either strengthening their risk and resilience functions currently or plan to within three years

Read on for a closer look at the findings in each sector, including the challenges and key actions we heard from supply chain leaders in our survey.



KPMG 2026 US Supply Chain Survey: Technology

About the survey

KPMG surveyed

462

US supply chain leaders at companies with

$1B

or more in annual revenue as part of the

2026

US Supply Chain Survey.

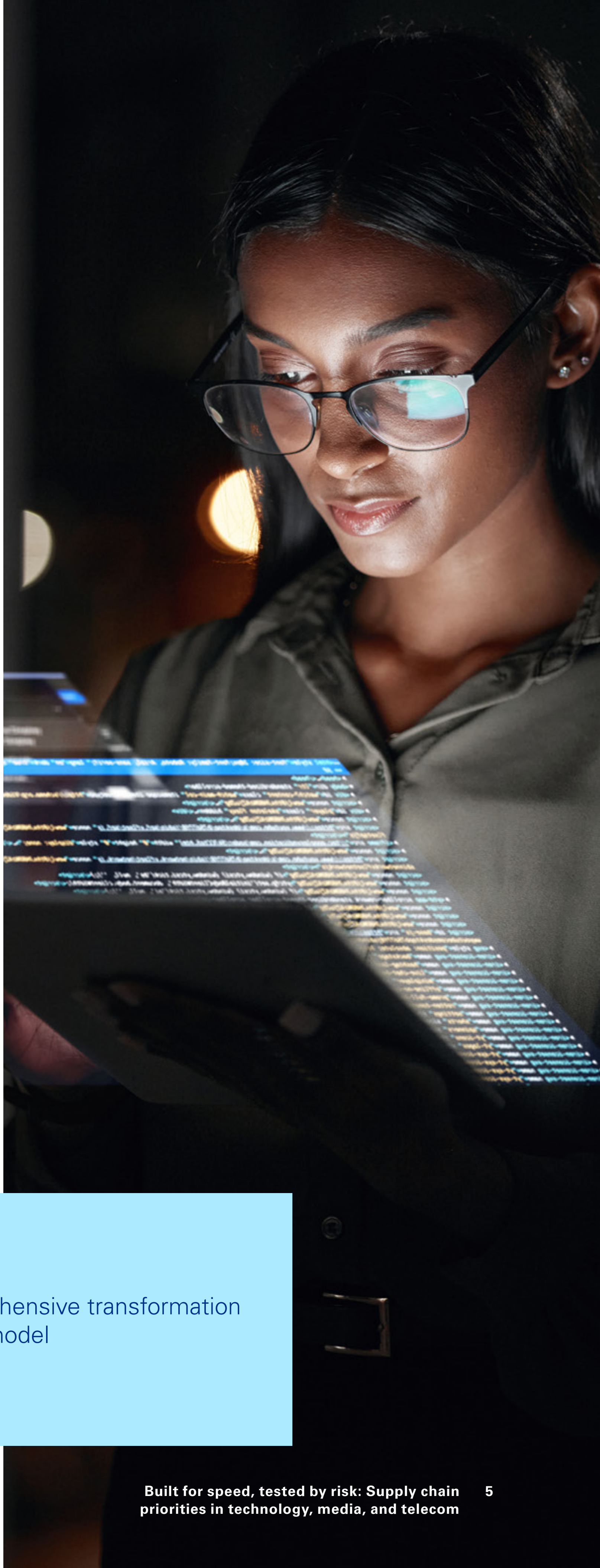
This technology industry review includes data from 53 respondents across segments including: software, hardware, semiconductors, AI, cloud and hyperscale computing, IoT and connected devices, and related technology organizations.

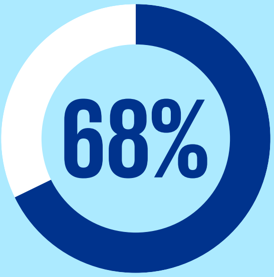
The AI buildout is remaking the technology supply chain

The race to build AI infrastructure has moved the supply chain to the center of the technology agenda. Data centers, chips, and devices all depend on components and materials that are scarce, contested, and increasingly shaped by trade policy and product roadmaps now run through that reality. In this components arms race, the supply chain can now be a true competitive advantage.

Two supply chain cultures share this sector. Hardware and semiconductor veterans operate some of the most sophisticated planning and risk functions in any industry. Meanwhile, software-native companies pushing into physical products are building hardware supply chains for the first time and learning the discipline of physical operations on the fly.

The survey points to a sector deep into its modernization journey. Two-thirds of technology leaders are planning a comprehensive change to their supply chain model for a substantial commitment, though below the average across all industries in our survey. One likely explanation: Much of the sector has been at this work for some time, and the emphasis has shifted from launching transformation to executing it, connecting systems, strengthening supplier management, and preparing the foundations that AI-driven operations will require.





are planning a comprehensive transformation of their supply chain model

Risk lurks deep in the supplier network

Technology leaders see risk concentrated in the supplier network and increasingly in the tiers they cannot see. Multi-tier supplier exposure tops the sector's risk list, ahead of geopolitical disruption and supply shortages, and the pressures compound one another: The components and materials behind the AI buildout carry long lead times, contested sourcing, and growing exposure to tariffs, sanctions, and export controls. That makes visibility a rising priority, as teams work to gather the information they need about their suppliers and their suppliers' suppliers to spot potential risks hiding across the network before they disrupt production.

Top perceived supply chain risks:

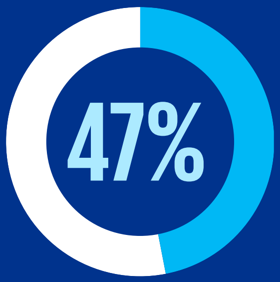
49% Multi-tier supplier risk

45% Geopolitical risks

34% Supply shortages

Trade pressure rewrites the sourcing playbook

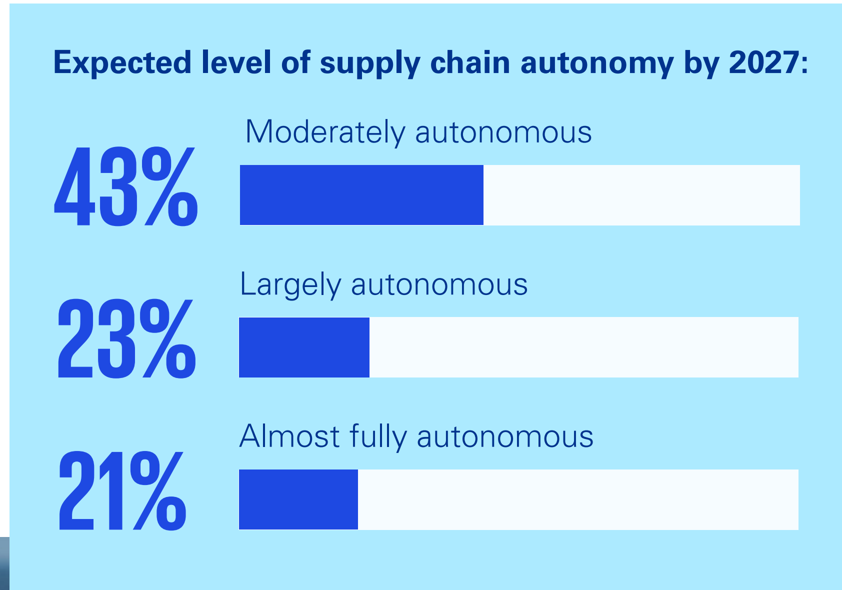
Tariffs and trade restrictions are forcing a rethink of sourcing itself. Nearly half of technology leaders are responding by looking to broaden their supplier base, while 40 percent are reconfiguring their network footprints and the same number are automating processes to blunt the cost impact. Diversification brings its own discipline: pre-qualifying new partners before committing, monitoring existing ones across multiple risk domains, and keeping qualified alternatives ready so that the next disruption can be met with options already vetted and in place.



are diversifying their supplier base to mitigate tariff-related costs

Grading digital on a tougher curve

Technology reports one of the lowest rates of complete supply chain digitalization in the entire survey, a surprising result for the industry that builds the tools. But this likely suggests that sector leaders are setting a higher bar, not signaling lower maturity. In this sector, fully digital increasingly means autonomous, AI-driven operations. The ambition backs that reading: 87 percent expect their supply chains to operate with at least moderate autonomy by 2027.



The talent equation, and the AI response

The skills gap is most acute in demand planning (51 percent) and procurement and sourcing (49 percent)—functions central to the more analytical supply chain organization the sector is building. The top response is investing in employee training and development (64 percent), even as three in four leaders expect AI to significantly transform the supply chain workforce. Both moves are already visible in practice: Companies are upskilling planning teams while shifting tactical work (such as supplier onboarding) to AI agents running on top of core systems.

83% report a talent gap in the supply chain function

The CSCO takeaway

Technology supply chains are being rebuilt around deeper multi-tier visibility, a broader and better-qualified supplier base, and the data foundations that autonomous operations will require. Leaders are pairing that structural work with sustained investment in planning talent positioning their teams to execute at the pace the AI economy now demands.

KPMG 2026 US Supply Chain Survey: Telecommunications

About the survey

KPMG surveyed

462
US supply chain leaders at companies with

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US Supply Chain Survey.

This telecommunications industry review includes data from 52 respondents across segments including: mobile and wireless, broadband, satellite communication, long-haul and wholesale telecommunications, and related telecommunications organizations.

Telecom aims to modernize while keeping the network moving

In telecommunications, the supply chain serves critical infrastructure and operates under the scrutiny that comes with it. Regulation shapes what these organizations buy and who they buy it from. National-security rules restrict network equipment and suppliers. And service continuity is non-negotiable: Networks must keep running through every upgrade, migration, and market shift.

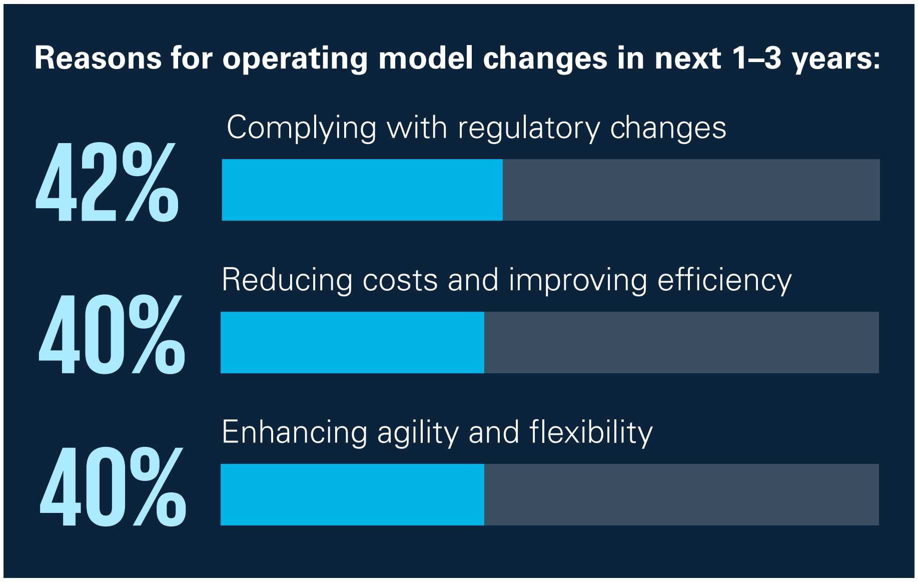
That operating environment sets the transformation agenda. Nearly two-thirds of telecommunications leaders are planning comprehensive change to the supply chain model, and the most-cited reason is complying with regulatory moves. Sector leaders face a unique balancing act: modernize the supply chain without ever interrupting service, with an approach that leans toward deliberate, well-sequenced change over big-bang moves. And that modernization effort is broader than many outside the industry realize, spanning network construction on one side and device logistics on the other, each with its own suppliers, risks, and rhythms.

65%

are planning a comprehensive transformation of their supply chain model

A complex risk agenda

Regulatory risk (46 percent) leads the concerns of telecommunications supply chain leaders, followed by cybersecurity threats and multi-tier supplier exposure (37 percent each). For many organizations, the reasons are structural: National-security restrictions reach directly into sourcing decisions, determining which equipment and suppliers are off-limits, while evolving trade policy adds another layer of complexity. Against that backdrop, cybersecurity is critical, with customer data and network integrity raising the stakes of every supplier and system decision. In this sector especially, compliance is a critical supply chain competency.



A pragmatic playbook for trade pressure

Geopolitical and tariff pressures land across both sides of the sector's supply chain network construction and device logistics alike. When adjusting to geopolitical risk, leaders cite new government regulations on protectionism and national security as their top challenge (44 percent), followed by operational disruptions and transportation delays. Tariff pressures also rank among the sector's leading drivers of supply chain transformation. The responses emphasize readiness over reaction: stocking critical components, investing in predictive analytics, and keeping supplier and distribution options flexible.

Near-term measures to mitigate tariff-related costs:

42% Increase inventory or buffer stock to manage cost volatility

37% Diversify supplier base or shift to alternative markets

31% Optimize cost structure through automation or process efficiencies

31% Renegotiate supplier contracts or terms

Proving AI value, then scaling it

Industry leaders rate their digital progress as high, with 85 percent describing supply chain operations as completely digitalized. The sector's AI plans start small and build: Pilot projects top the list of ways leaders expect to overcome deployment challenges, followed by investments in data management, enterprise resource planning (ERP) upgrades, and governance frameworks. That sequence suggests a test-and-strengthen approach to prove value first, shore up the data and systems underneath, then scale what works. The ambition remains substantial: 86 percent expect their supply chains to operate with at least moderate autonomy by 2027.

How leaders plan to overcome AI deployment challenges:

The talent gap behind the analytics push

Eighty-three percent of leaders report a supply chain talent gap, felt most in demand planning, order fulfillment, supply chain visibility, and logistics. The skills in demand are increasingly analytical—forecasting, data interpretation, decision support and a shift from the transactional profile of traditional procurement roles. The sector's top response is building comprehensive recruitment strategies (53 percent), even as rapid technology change and limited upskilling investment complicate the effort. AI adds urgency to the equation: Every respondent expects the technology to affect the supply chain workforce in some way, and three in four envision significant changes.

75% expect AI to transform the supply chain workforce and replace humans significantly

The CSCO takeaway

Telecommunications supply chains are modernizing on two fronts at once: strengthening compliance and cyber readiness around critical infrastructure while building the inventory buffers, supplier options, and data foundations that keep networks and devices moving. The talent strategy follows suit, recruiting analytical skills and preparing the workforce for AI-enabled operations.

KPMG 2026 US Supply Chain Survey: Media

About the survey

KPMG surveyed

462

US supply chain leaders at companies with

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2026

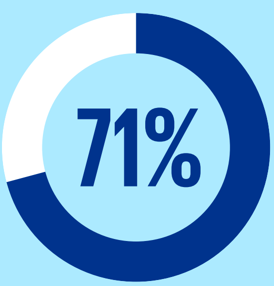
US Supply Chain Survey.

This media industry review includes data from 51 respondents across segments including: digital media and streaming, advertising, marketing, and creative services, publishing, gaming and interactive media, broadcasting, and related media organizations.

Media's unique supply chain runs on many moving parts

The media supply chain is an ecosystem: content creators, production partners, and technology vendors, many of them small and highly specialized. Schedules often depend on all of them delivering a missed handoff anywhere in the web can ripple through a production, a release, or a distribution window.

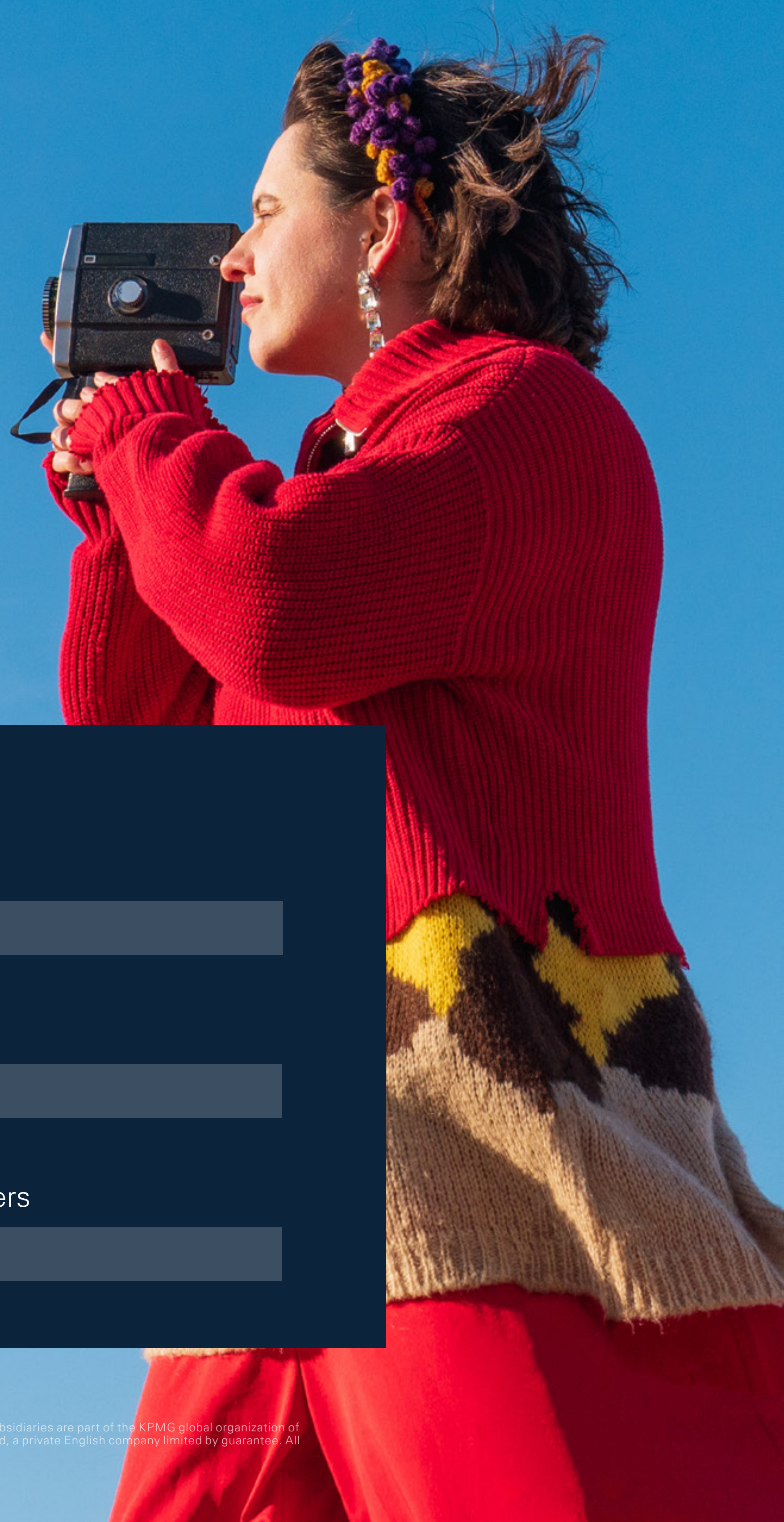
That web is being reshaped from the demand side, too, as audience behavior and distribution channels keep shifting across streaming, mobile, and emerging platforms. The survey shows a sector responding with structural change: 7 in 10 media leaders are planning comprehensive transformation of the supply chain model, with enhancing agility and increasing resilience among the most-cited reasons for changing how they operate. The goal is an operation that can flex with the audience without losing its grip on the network that makes everything run.



are planning a comprehensive transformation of their supply chain model

Supplier fragility tops the risk agenda

Media leaders see their biggest risks inside the partner web itself. Multi-tier supplier exposure and supply shortages share the top of the risk list, and the sector's distinctive concern follows right behind: the financial health of suppliers. Many critical partners are small, specialized firms without deep balance sheets, so a single failure can put delivery at risk. That makes third-party risk management an important through-line, understanding not just who your partners are, but how stable they are and who stands behind them.



Top perceived supply chain risks:

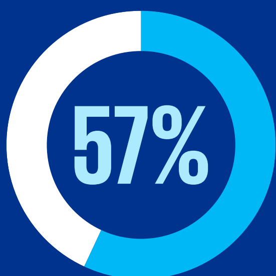
41% Multi-tier supplier risk

41% Supply shortages

37% Financial health of suppliers

Geopolitical disruption meets the production schedule

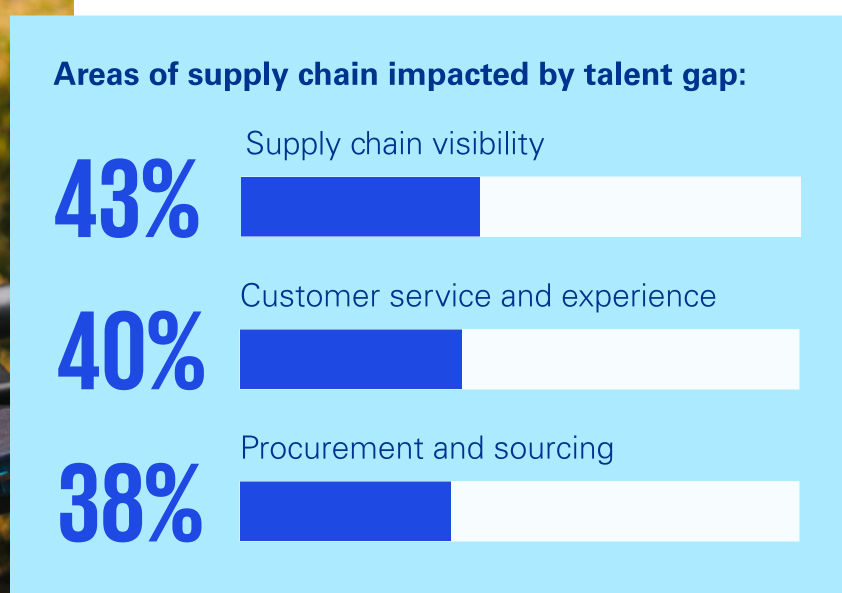
For media companies, geopolitical uncertainty can be another schedule risk. When conditions shift, leaders say the hardest parts are keeping operations running, moving goods on time, and seeing the next change coming. The responses lean commercial. On tariffs, renegotiating supplier contracts (41 percent) and financial hedging (37 percent) lead the playbook, and many companies are passing remaining costs through to pricing. On broader geopolitical risk, the top strategy is rearranging supply networks toward nearshoring (49 percent). The pattern favors flexibility in deals and dollars over rebuilding physical networks.



cite operational disruptions as their top challenge in adjusting to geopolitical risks

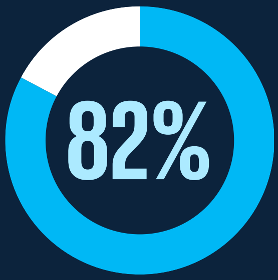
Chasing a talent gap, with automation on deck

Seventy-eight percent of media leaders report a talent gap, felt most in supply chain visibility, customer service and experience, and procurement and sourcing. The work itself has changed: Procurement now means data-intensive coordination across platforms and partners, a different profile than the roles many teams were built around. The sector's top response is investing in automation and AI (58 percent) to reduce reliance on hard-to-find skills, though leaders flag limited upskilling investment as a risk that could slow the plan.



Data-rich, with foundations still to build

Media rates its digital progress high, and the sector generates more customer and platform data than ever. The AI agenda suggests leaders want stronger footing underneath it. Their plans for overcoming deployment challenges start with ERP upgrades, followed by governance guidelines, data management, and pilot projects. The ambition is measured, but real: 70 percent expect their supply chains to operate with at least moderate autonomy by 2027. The work ahead is converting data volume into signals the operation can act on.



say their supply chain operations are completely digitalized

The CSCO takeaway

Media supply chains are being reinforced at their most fragile points—deepening visibility into a fragmented partner network, keeping commercial terms flexible against trade and geopolitical pressure, and using automation to close talent gaps that hiring alone won't fill.

How KPMG helps technology, media, and telecommunications leaders modernize supply chain execution

As supply chains in these sectors grow more complex, with more suppliers and tiers, more regulatory and trade exposure, more data than teams can readily act on, many organizations are finding that their operating models haven't kept pace. Signals arrive late, decisions move slowly, and value can leak across planning, sourcing, logistics, inventory, and execution.

That's the gap KPMG LLP (KPMG) helps close: connecting planning, data, AI, governance, and physical execution so organizations can improve decisions and carry them through. That work can include helping organizations to:

Diagnose where risk hides and value leaks

Identify the suppliers, tiers, categories, inventory policies, workflows, and exception patterns where the current model may be creating disruption exposure, premium cost, schedule risk, or compliance gaps.

Redesign the operating model around decisions

Define the decision rights, escalation paths, roles, workflows, and shared success measures required to connect planning, procurement, logistics, compliance, finance, and day-to-day execution.

Deepen multi-tier supplier visibility and management

Improve supplier qualification, monitoring, performance visibility, and contingency options across the extended network, including the partners behind your partners.

Scale digital and AI capabilities responsibly

Prioritize use cases with the clearest operational value, define the data and governance conditions required to scale them, and connect digital or AI outputs to the workflows, controls, and people responsible for action.

Strengthen resilience across the network

Evaluate supplier risk, tariff exposure, trade and regulatory requirements, sourcing options, inventory positioning, and service commitments as interconnected supply chain decisions.

Sustain performance after transformation

Establish the operating rhythms and KPIs needed to monitor supplier performance, exception management, adoption, cost, risk, and decision effectiveness, and use those results to adjust models, workflows, and decision rules over time.

For technology, media, and telecommunications leaders, supply chain modernization is becoming central to resilience, service, and growth. KPMG can help your organization move from ambition to execution, linking strategy, technology, governance, suppliers, talent, and operations so transformation efforts deliver practical value.

Explore KPMG Supply Chain services

Start a conversation

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