SUPPLY CHAIN
TREND REPORT
2027



WHITE PAPER

SUPPLY CHAIN TREND REPORT 2027

The supply chain trends shaping shipper priorities, including industry-specific insights, decision-making priorities and the capabilities organizations need from supply chain partners

LEGACY
SUPPLY CHAIN

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EXECUTIVE SUMMARY

Legacy Supply Chain's study of 169 supply chain professionals reveals an operating environment shaped by cost pressure, market volatility, transportation complexity, warehouse constraints and rising expectations for technology-enabled visibility and execution. Across the full respondent base, transportation cost or carrier performance is the most frequently selected current pressure (42.0%). Market volatility is the leading barrier to resolving high-pressure issues (43.2%). When evaluating partner value, respondents most often select lower costs without service tradeoffs (51.5%), followed by better technology capabilities (35.5%) and better supply chain visibility (34.3%).

The findings also vary by industry. CPG and Retail respondents emphasize transportation cost and carrier performance, service reliability, warehouse capacity and labor. Manufacturing and Industrial respondents report particularly strong pressure from international freight, customs and trade compliance, as well as warehouse capacity and inventory accuracy. Across both groups, warehouse management systems, inventory visibility, transportation management systems and AI-enabled insights feature prominently in technology priorities.

Role-based comparisons show that final decision-makers and influencers share many expectations but emphasize different pressures. Decision-makers more frequently identify transportation cost or carrier performance and warehouse labor/productivity as leading concerns. Influencers more often cite market volatility and international freight/customs/trade compliance. Both groups recognize the importance of technology, visibility and operational problem-solving.

42.0%
Transportation Cost & Carrier Performance

43.2%
Market Volatility as the Leading Barrier

51.5%
Lower Costs Without Service Tradeoffs

THE RESEARCH AT-A-GLANCE

The analysis draws on responses from 169 supply chain professionals. Industry comparisons focus on CPG & Retail and Manufacturing & Industrial respondents. Role comparisons focus on final decision-makers and respondents who influence supply chain decisions.

The report examines barriers to improvement, warehousing and distribution models, desired partner improvements, partner-value drivers, areas of recent improvement, transportation-capacity sourcing, current pressure areas, technology priorities and warehouse challenges.

THE PRIORITIES: INSIGHTS FROM SUPPLY CHAIN PROFESSIONALS

1. Market volatility is the leading barrier to change

Across all respondents, 43.2% identify market volatility—including tariffs, regulations and other external forces—as a barrier to resolving their highest-pressure supply chain issues. The next most frequently selected barriers are lack of long-term supply chain strategy or clarity (21.9%), not having the right supply chain partners or 3PLs to drive value (18.3%), and being locked into a service contract that cannot yet be changed (16.6%). This points to a challenging combination: organizations must respond to external uncertainty while also addressing internal strategic and partner constraints.

2. Cost, technology & visibility shape partner value

More than half of all respondents (51.5%) say a partner would be more valuable if it could lower costs without service tradeoffs. Better technology capabilities (35.5%) and better supply chain visibility (34.3%) are the next most frequently selected value drivers. Stronger warehouse or transportation problem-solving (27.8%) and more strategic or proactive guidance (26.0%) also rank highly. The pattern suggests that value is defined not by cost reduction alone, but by the ability to improve performance and provide the information and expertise needed to sustain it.

3. Transportation & international complexity remain significant pressure points

Transportation cost or carrier performance is the most frequently selected current pressure across the full sample (42.0%)*. International freight, customs or trade compliance follows at 28.4%, with labor, productivity or warehouse operations at 23.7%. Supply chain visibility, accuracy or reporting is cited by 18.9%, and warehousing capacity or facility constraints by 16.6%. These results show that transportation economics, cross-border complexity and the execution of warehouse operations are interconnected priorities.

4. Despite progress in warehouse operations, key challenges remain

40.2% of survey respondents said warehouse operations and productivity was the most significant area of improvement they have had over the last 12-18 months. At the same time, respondents identify limited warehouse space or capacity (36.1%), labor shortages, turnover or productivity issues (33.1%) and rising facility, labor and operating costs (32.5%) as their leading warehouse challenges. While productivity gains are being made, those gains are not translating into lowered costs, necessarily.

5. Technology priorities span core systems and advanced intelligence

Warehouse management systems lead technology priorities across the full respondent base (38.5%). Real-time inventory visibility (35.5%), transportation management systems (32.0%), and AI-driven insights or recommendations (30.8%) follow closely. Shipment tracking and status updates are selected by 28.4%. The distribution of responses indicates demand for an integrated technology environment: core systems to manage execution, visibility to understand inventory and movement, and analytics or AI to support better decisions.



INDUSTRY SPOTLIGHT: CPG & RETAIL

CPG and Retail respondents most frequently identify transportation cost or carrier performance as a current pressure (42.9%). Market volatility is the leading barrier to resolving those pressures (46.9%). In terms of partner value, 55.1% select lower costs without service tradeoffs, followed by better supply chain visibility (34.7%), better technology capabilities (32.7%) and more strategic or proactive guidance (28.6%). This cohort's priorities combine financial discipline with service continuity and a clearer view of performance.

Warehouse space and workforce capacity are also important. Limited warehouse space or capacity is selected as a top warehouse challenge by 38.8%, while 34.7% cite labor shortages, turnover or productivity issues and 24.5% cite rising facility, labor or operating costs. Warehouse operations and productivity are the most frequently cited area of recent improvement (36.7%); carrier performance and reliability follow at 26.5%.

Technology priorities are broad: 36.7% select warehouse management systems, 32.7% transportation management systems and 30.6% real-time inventory visibility. AI-driven insights or recommendations are selected by 24.5%. The findings suggest CPG and Retail organizations are looking for partners that can connect warehouse and transportation execution, strengthen service reliability, and adapt capacity and labor to changing demand.

KEY PRIORITIES

- Lower costs without service tradeoffs
- Better supply chain visibility
- Better technology capabilities
- More strategic or proactive guidance



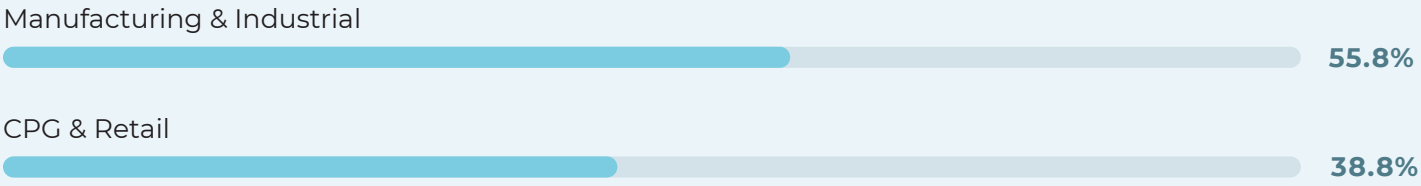
INDUSTRY SPOTLIGHT: MANUFACTURING & INDUSTRIAL

Manufacturing and Industrial respondents show a particularly strong focus on global trade complexity. International freight, customs or trade compliance is selected as a top-three pressure by 37.2%, compared with 22.4% of CPG and Retail respondents. Transportation cost or carrier performance is also prominent (32.6%), followed by labor, productivity or warehouse operations (27.9%). Market volatility is selected as a barrier by 58.1%, the highest of the two industry groups.

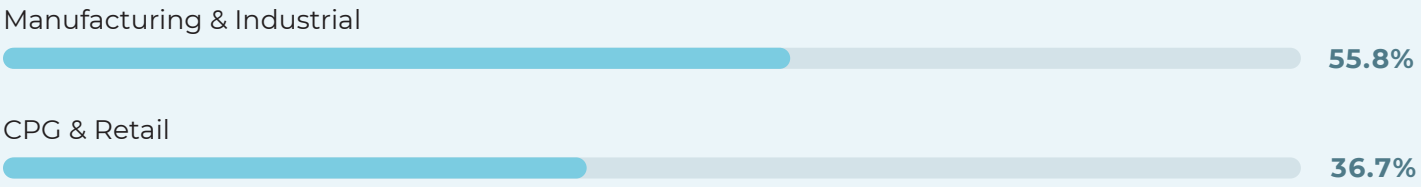
Warehouse capacity stands out: 55.8% identify limited warehouse space or capacity as a leading warehouse challenge, compared with 38.8% of CPG and Retail respondents. Inventory accuracy or visibility gaps are selected by 32.6%, and rising facility, labor or operating costs by 27.9%. Warehouse operations and productivity are the most frequently cited area of recent improvement (46.5%), while inventory visibility and accuracy are cited by 30.2%.

Technology priorities align with these operating demands. Warehouse management systems are selected by 55.8%—substantially higher than the CPG and Retail result of 36.7%. Transportation management systems are selected by 34.9%, while AI-driven insights and shipment tracking are each selected by 32.6%. These responses point to the importance of warehouse execution systems, inventory control and stronger visibility across complex supply chains.

WAREHOUSE CAPACITY CHALLENGES



WAREHOUSE MANAGEMENT SYSTEMS



DECISION-MAKERS & INFLUENCERS:
SHARED GOALS, DIFFERENT EMPHASIS

Final decision-makers more frequently identify transportation cost or carrier performance as a top-three pressure (54.2%, compared with 45.5% of influencers). They also more frequently select labor, productivity or warehouse operations (33.3%, compared with 19.7%).

Influencers more often identify international freight, customs or trade compliance (33.3%, compared with 22.9% of decision-makers) and market volatility as a barrier to resolving high-pressure issues (51.5%, compared with 35.4%).

Both groups prioritize better partner value through lower costs without service tradeoffs, but decision-makers select this option more frequently (64.6%, compared with 50.0% of influencers). Decision-makers also more frequently select better technology capabilities (35.4%, compared with 27.3%). Influencers place greater emphasis on better supply chain visibility (37.9%, compared with 33.3%) and strategic or proactive guidance (27.3%, compared with 25.0%).

Technology priorities are closely aligned. Decision-makers most frequently select AI-driven insights and real-time inventory visibility (41.7% each), while influencers most frequently select warehouse management systems (43.9%), followed by real-time inventory visibility (34.8%) and transportation management systems (31.8%). Both groups value better information and technology.

Differences in ranking of priorities suggest the importance of involving executive sponsors and operational influencers in both technology and partner decisions.

DECISION-MAKERS

Transportation cost or carrier performance
54.2%

Labor, productivity or warehouse operations
33.3%

INFLUENCERS

International Freight & Trade Compliance
33.3%

Market volatility as a barrier
51.5%

A SHARED PRIORITY
Lower costs without service tradeoffs

64.6%
Decision-Makers

50.0%
Influencers

QUESTIONS

Key questions every supply chain leader should ask themselves

01 Are cost-reduction efforts improving efficiency without creating service, capacity or inventory tradeoffs?

02 Where do transportation cost, carrier performance and international trade requirements create the greatest exposure?

03 Does the company have a clear view of warehouse capacity, labor productivity and inventory accuracy?

04 Are WMS, TMS, inventory and shipment-visibility capabilities sufficiently connected?

05 Can supply chain partners adapt capacity, solve operating problems and communicate proactively when conditions change?

06 Are analytics and AI being used to produce actionable recommendations and measurable operational improvements?

07 Are executive decision-makers and operational influencers aligned on the outcomes expected from supply chain initiatives and providers?

6 RECOMMENDATIONS FOR BUILDING A MORE EFFECTIVE SUPPLY CHAIN



THE SURVEY POINTS TO SEVERAL PRACTICAL RECOMMENDATIONS FOR SHIPPERS AND MANUFACTURERS:

01 **Connect cost and service** outcomes. Evaluate savings alongside reliability, fulfillment performance, inventory accuracy and customer impact.

02 **Build flexibility** into the operating model. Review warehouse capacity, labor plans, transportation sourcing and network design against changing demand and external conditions.

03 Treat **visibility as an operating capability**. Connect WMS, TMS, inventory and shipment data so teams can identify exceptions and act before service is affected.

04 Address **cross-border complexity** proactively. Clarify ownership for international freight, customs and trade compliance, and ensure partners provide timely information as conditions change.

05 **Match technology to measurable needs**. Prioritize systems and AI capabilities based on the operational decisions they improve—not technology adoption for its own sake.

06 Bring decision-makers and influencers into the same conversation. **Align strategic objectives** with the practical requirements of the people managing daily execution.

CONCLUSION: SUPPLY CHAIN ADVANCEMENT DEPENDS ON CONNECTED EXECUTION

Supply chain leaders should use this moment to move beyond reacting to disruption and take a more deliberate approach to strengthening their operations. That starts with a focus on connecting people, processes, data and systems to create more coordinated operations that can adapt as conditions change.

Supply chain leaders should also be reassessing where their supply chains are most vulnerable, identifying the constraints that limit performance, and prioritizing improvements that deliver measurable results. Shippers and manufacturers should evaluate whether their current warehouse capacity, labor models, transportation networks and technology investments can support changing business demands. They should also take a closer look at their supply chain partnerships—challenging providers to bring forward new ideas, improve visibility, solve problems proactively and translate technology into better execution.

The opportunity is to build supply chains that do more than keep pace with today's demands—they should create a competitive advantage for the business. Legacy helps organizations make that progress through a partnership built around delivering transformational impact, connected intelligence and scalable solutions. By combining operational expertise, technology-enabled insights and flexible capabilities, Legacy helps shippers and manufacturers connect their supply chains, transform how they operate and scale with confidence as their businesses evolve.

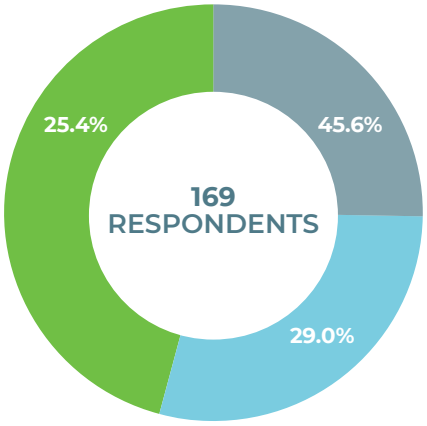


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APPENDIX: ABOUT THE RESPONDENTS

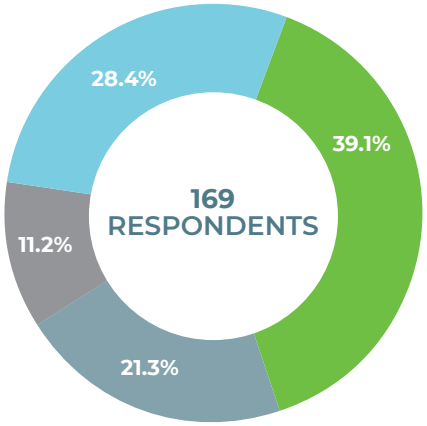
This report analyzes the 169 responses by supply chain professionals across multiple industries. Industry comparisons focus on CPG & Retail and Manufacturing & Industrial respondents; role comparisons focus on final decision-makers and respondents who influence decisions. Percentages are calculated within the relevant respondent group for each comparison. Multi-select and ranked questions allow more than one response, so percentages may exceed 100%. Results are descriptive and should be interpreted directionally.

INDUSTRY CATEGORY



- Manufacturing & Industrial
- CPG & Retail
- Other

DECISION MAKER STATUS



- I am a final decision-maker
- I influence decisions
- I provide input for consideration when asked
- I am not involved in partner or vendor decisions

ANNUAL REVENUE RANGE

Over $5B	12.4%
$1B–$5B	12.4%
$500M–$1B	8.9%
$250M–$500M	7.1%
$100M–$250M	8.3%
$50M–$100M	3.0%
$25M–$50M	5.9%
$10M–$25M	4.7%
$5M–$10M	1.8%
$1M–$5M	3.6%
$500K–$1M	1.2%
Under $500K	0.6%
Not available/unclassified	30.2%

WAREHOUSING & DISTRIBUTION OPERATING MODEL

Warehousing is managed entirely in-house (in-sourced) — 46.2%

Hybrid model – some warehouses are in-sourced and some managed by 3PLs — 29.6%

Warehousing is outsourced entirely to third-party logistics provider(s)(3PLs) — 11.8%

Warehousing is handled by an external party, such as a distributor, retailer, or parent company. — 7.1%

No, our organization does not utilize warehousing services — 5.3%

METHOD(S) FOR SECURING TRANSPORTATION CAPACITY

Direct contracts with carriers	37.3%
A mix of owned/dedicated assets and third-party capacity	25.4%
Company-owned, dedicated assets	17.2%
Leverage transportation brokers or other non-asset providers	15.4%
Unsure	4.7%



SAMPLE COMPANY RESPONDENTS
WITH REVENUE OVER $250 MILLION

Adidas	American Airlines	Aspire Bakeries
Atkore	Dawn Foods	Deciem
Doman	ECI Electrical Components International	Elekta
Elkem	EquipmentShare	Everstory Partners
Fountain Tire Ltd	Freudenberg Medical LLC	Future Electronics Corporation
GE Appliances	Generous Brands	Heritage Operations Group
Johnson & Johnson	Johnsonville Sausage	L3harris Technologies Inc
Lakeshore Learning	Lipton	Lockheed Martin
Lutron Electronics	Magellan Aerospace	Medxcel
Modern Niagara	Niagara Bottling	Oklahoma State University
Oshkosh Defense	Owens Corning	PepsiCo
Prada	Pregis Corporation	Quincy Compressor
See's Candies	Shurtape Technologies	Siemens Healthineers
Stitch Fix	Sun Hydraulics	SunOpta
Technimark	Tenova	The Service Companies
The Walt Disney	Tory Burch LLC	Unilever
Versace	Wahl Clipper Corporation	Wegmans



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