Infosys™
Portland

2026 Portland Procurement Value Survey

Delivering value in the age of AI and uncertainty

Amplifying human capability in procurement

Industrial Manufacturing Industry Benchmark

Delivering value in the age of AI and uncertainty

2026 Infosys Portland Procurement Value Survey: *Industrial Manufacturing Benchmark*

ENABLERS

Foundational capabilities, tools and ways of working enabling effective performance.

Fig 1: Team Capability *(scale of 1-4)*
Skills and capacity to deliver value

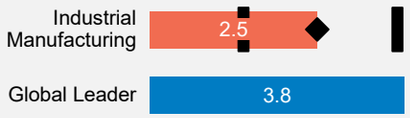


Fig 2: Tech Satisfaction *(scale of 1-4)*
Perceived tech effectiveness

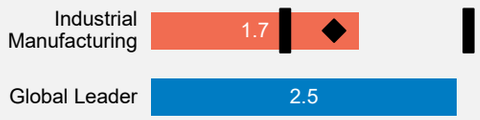


Fig 3: Collaboration *(scale of 1-4)*
Quality of cross-functional working

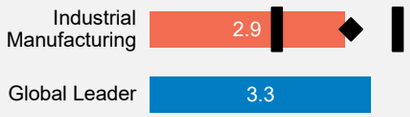
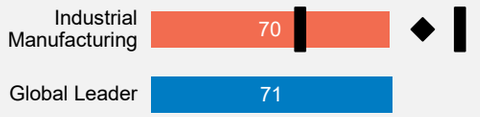


Fig 4: Spend Actively Managed *(0 – 100%)*
Proportion of spend under management



OP MODEL AND OPERATIONS

Allocation of time and effort across operational, core and value-add activities.

Fig 5: Time Spent on Activities *(sum to 100%)*
Percent time spent on procurement activities

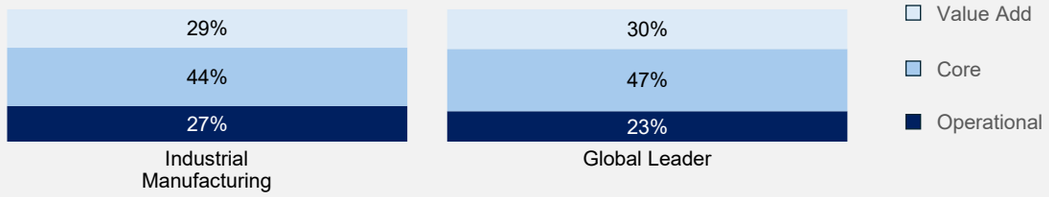
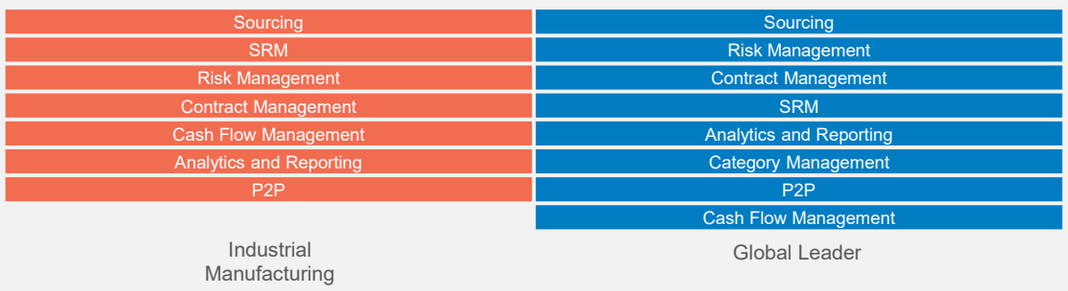


Fig 6: Value Activities Performed
Breadth of value management actions undertaken



VALUE

Procurement impact across financial, risk, innovation and ESG value areas.

Fig 7: Financial Value Delivered *(scale of 1-4)*
Measured financial contribution achieved

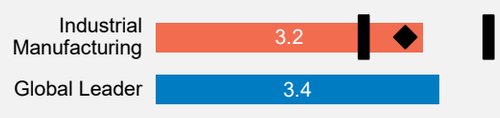


Fig 8: Meeting Expectations *(scale of 1-3)*
Extent value delivery meets expectations

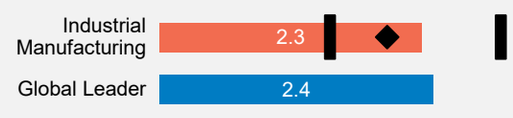


Fig 9: Risk Preparedness *(scale of 1-4)*
Readiness to manage disruption

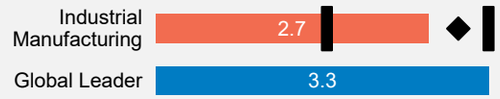


Fig 10: Supply Chain Visibility *(scale of 0-5)*
Transparency across supplier tiers

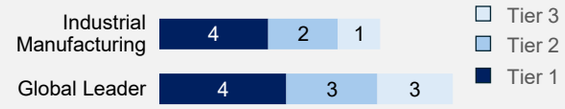


Fig 11: Co-Innovation *(scale of 1-4)*
Supplier collaboration on innovation

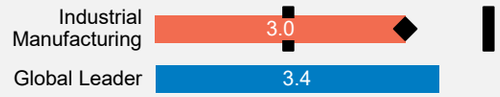
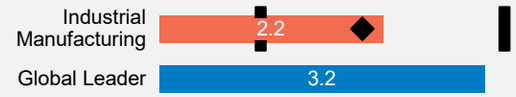


Fig 12: ESG *(scale of 1-4)*
Effectiveness of sustainability contribution



FUTURE PROOFING

Procurement positioning to adapt and perform in dynamic and uncertain environments.

Fig 13: Org. Alignment *(scale of 1-4)*
Alignment to enterprise priorities

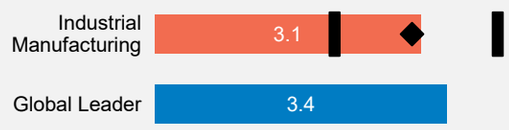


Fig 14: AI Investment *(% increase)*
Percent growth in AI investment from last year

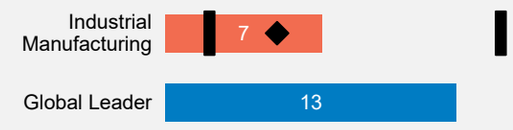


Fig 15: New Ways of Working *(scale of 1-4)*
Processes fit for future needs

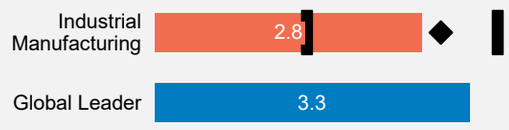
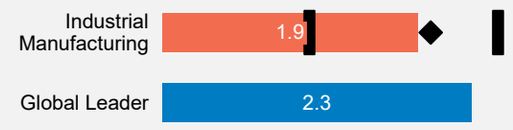


Fig 16: Adaptability *(scale of 1-4)*
Ability to respond to change



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Industry Average **Global Leader Average**
Industry Median **Industry 25th and 75th percentile**

INDUSTRIAL MANUFACTURING PROCUREMENT PERFORMANCE SUMMARY

PERFORMANCE SNAPSHOT – Across industrial manufacturing, procurement performance reflects a function operating under sustained margin pressure, capital intensity, and accelerating technological change across production and supply networks. Most organisations continue to deliver reliable baseline outcomes, but performance remains uneven and often reliant on individual effort rather than a consistently embedded, system-led approach.

INDUSTRY PRESSURES – As manufacturing supply chains become more regionalised and operational complexity increases, value creation remains largely reactive, with limited ability to anticipate or absorb disruption without intervention. Procurement is increasingly expected to balance cost, continuity, and resilience simultaneously, rather than optimising for any single outcome in isolation.

PRIORITY FOCUS – Leading manufacturers are beginning to treat procurement as an integrated system that evolves continuously, rather than optimising for stability in environments that are no longer predictable. The priority is building capabilities that allow procurement to rebalance cost, continuity, and resilience as conditions shift, supported by usable technology, adaptable operating models, and clearer prioritisation. This includes strengthening upstream decision-making so trade-offs around suppliers, capacity, and risk are addressed earlier, before they are locked into production and supply network design.

ENABLERS

PERFORMANCE SNAPSHOT – Manufacturing procurement teams generally have foundational enablers in place, but overall team capability remains uneven. Teams deliver day-to-day outcomes, yet limitations in depth and consistency reduce confidence as conditions shift. Technology platforms are widely deployed, though satisfaction remains low due to fragmented data and limited integration into daily workflows.

INDUSTRY PRESSURES – Manufacturing environments increasingly demand faster decisions across plants, regions, and suppliers as supply chains regionalise and production becomes more digitally enabled. Procurement is expected to support these decisions with reliable, timely insight while managing greater operational and supplier complexity.

PRIORITY FOCUS – The priority is strengthening the link between people, data, and technology so insight consistently informs decisions. Improving usability, data trust, and integration allows procurement to better support manufacturing operations and enable AI to act as an amplifier rather than a parallel system.

VALUE

PERFORMANCE SNAPSHOT – Procurement value in industrial manufacturing is anchored in strong financial delivery and consistently meeting expectations. Cost outcomes are reliable, and procurement plays a central role in supporting production continuity. Visibility into Tier-1 suppliers is high, providing confidence in immediate supply and day-to-day manufacturing performance.

INDUSTRY PRESSURES – The definition of value is expanding beyond cost and continuity. Manufacturers are expected to demonstrate resilience and sustainability alongside financial performance. Capital intensity and long asset lives limit flexibility, making it harder to adjust value trade-offs once decisions are embedded in products, contracts, or production plans.

PRIORITY FOCUS – The priority is broadening how value is defined and managed without weakening the financial baseline. Embedding risk and sustainability considerations earlier in sourcing and supplier decisions allows procurement to manage trade-offs more deliberately and protect manufacturing outcomes as expectations continue to evolve.

OP MODEL AND OPERATIONS

PERFORMANCE SNAPSHOT – Procurement operating models in industrial manufacturing are generally well established and support consistent execution across complex, capital-intensive environments. Core processes are stable, roles are reasonably clear, and procurement is embedded in day-to-day manufacturing operations. This provides a solid foundation for reliability, continuity, and control.

INDUSTRY PRESSURES – Manufacturing operations are increasingly variable rather than steady-state. Shorter planning cycles, shifting production schedules, supplier reconfiguration, and more disruption pressures operating models designed for predictability. Teams must manage higher volumes of change while maintaining control across plants, categories, and regions.

PRIORITY FOCUS – The priority is evolving operating models to handle variability without adding friction or complexity. Simplifying workflows, clarifying decision rights, and reducing handoffs allows procurement to reallocate effort quickly and sustain execution while scaling value-adding activities as conditions change.

FUTURE PROOFING

PERFORMANCE SNAPSHOT – Manufacturing procurement organisations recognise the importance of future readiness, but preparedness remains uneven. Alignment to enterprise priorities is generally understood, yet future-oriented capabilities are not consistently embedded into day-to-day ways of working. As a result, readiness for change often depends on individual leadership rather than systemic capability.

INDUSTRY PRESSURES – Manufacturing faces structural change rather than short-term disruption. Automation and AI are reshaping how work is done, while demographic shifts and skills shortages increase reliance on technology and new operating models. Long investment cycles and capital constraints increase need to anticipate change rather than react to it.

PRIORITY FOCUS – The priority is building future readiness into how procurement operates, rather than treating it as a parallel transformation effort. Strengthening adaptability, developing skills alongside technology, and embedding forward-looking insight into routine decisions enables procurement to remain effective as environments continue to evolve.