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STATE OF INDUSTRY REPORT

Supply Chain, Enterprise Asset Management and Procurement in Australia and New Zealand, 2026

Industry Trends, Challenges and Priorities Shaping ANZ Operations

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Executive Summary

Australian and New Zealand organisations across energy, utilities, manufacturing, retail, government and mining face a convergence of cost pressure, workforce shortages, supply chain volatility and technology transformation. This report maps the current state of play across supply chain, enterprise asset management and procurement, and identifies six priority themes shaping the operational agenda for 2026.

The operating environment is demanding. Nearly half of Australian industrials report active supply chain disruptions,[1] while 68% of supply chain professionals cite rising costs and inflation as their primary concern.[2] **Only 9% of organisations report high supply chain visibility**[2], a striking figure at a time when volatility, geopolitical friction and shifting trade dynamics require better, faster decision-making.

Yet there is also significant forward momentum. Australia's enterprise asset management market is projected to grow at an 18.2% CAGR through 2030,[3] the predictive maintenance market is expected to reach AUD 1.6 billion by 2033,[4] and 54% of supply chain leaders plan to increase automation spend this year.[2]

In procurement, 50% of Australian professionals already use AI in their roles,[6] and 76% of organisations globally report AI-driven improvements of 25% or more in key performance metrics.[7]

On the SAP landscape, SAPinsider's 2026 Technology Leader's Strategic Agenda research finds that 45% of technology leaders are now live on SAP S/4HANA, with a further 17% currently implementing.[16] But significant challenges remain: aligning IT and business stakeholders (51%), managing cost while funding transformation (49%) and balancing innovation with operational stability (36%).[16]

With the 2027 end-of-mainstream-maintenance deadline approaching**, the window for strategic transformation is narrowing.**

Six Priority Themes

ENTERPRISE ASSET MANAGEMENT

Building Reliable Asset Operations Through Better Data, Maintenance and Execution

ENTERPRISE ASSET MANAGEMENT

Scaling Digital Maintenance and Closing the Workforce Gap

SUPPLY CHAIN MANAGEMENT

Moving from Reactive to Resilient Supply Chain Planning

SUPPLY CHAIN MANAGEMENT

Designing Scalable Warehousing and Connecting the MRO Supply Chain

PROCUREMENT

The Procurement Productivity Imperative: Doing More with Less Through AI and Orchestration

PROCUREMENT

Transforming Procure-to-Pay for Speed, Compliance and Control

This report draws on over 30 primary sources, including the Australian Industry Group, Prological, Grand View Research, IMARC Group, the Hackett Group, SAP Taulia, SAPinsider, EY and GlobalData, to provide an authoritative, data-driven view of ANZ operations in 2026. These industry trends have shaped the sessions at Mastering SAP Connect Gold Coast 2026 (3–5 June, Royal Pines Resort), designed to answer the most pressing questions facing EAM, supply chain and procurement professionals, and equip attendees with practical knowledge to apply in their organisations.

Contents

SECTION 1

The ANZ Operating Environment in 2026

The year 2026 finds Australia and New Zealand's industrial and operational sectors navigating a landscape defined by persistent disruption, cost escalation and accelerating technology adoption. The optimism of post-pandemic recovery has given way to a more sober recognition that volatility is structural, not cyclical. The organisations best positioned for the decade ahead are those investing in resilience, visibility and intelligent automation.

Visibility Gap Drives Resilience Spend

According to the Australian Industry Group, 47% of Australian industrials reported active supply chain disruptions in 2025, up from 35% in late 2024.[1] The Prological Supply Chain Pulse Check 2026 confirms the pressure: 68% of respondents cite rising costs and inflation as their primary concern, while 44% rank staff shortages as the second most significant challenge.[2]

Perhaps most revealing is the visibility gap. Only 9% of organisations report high supply chain visibility[2], a figure that underscores how far most operations remain from the real-time, data-driven decision-making that leading practice demands. At the same time, international trade and tariffs have entered the top three challenges at 29%, reflecting the growing impact of geopolitical friction on ANZ supply networks.[2]

Despite the headwinds, ANZ organisations are responding with increased investment. Some 44% of manufacturers intend to raise supply chain resilience spending in 2026,[1] and 54% plan to increase automation spend.[2] The supply chain management market in Australia is projected to grow at a CAGR of 10.21% from 2026 to 2034,[12] driven by digitisation, e-commerce demand and infrastructure modernisation.

47%

of Australian industrials report active supply chain disruptions in 2025

68%

cite rising costs and inflation as their primary concern

9%

report high supply chain visibility

Investment and Momentum

Sustainability is also reshaping investment priorities: 64% of organisations are pursuing carbon reduction projects across their supply chains.[2] And in New Zealand, business confidence sits at a 12-year high, with 56% of manufacturers expecting conditions to improve.[28]

SAPinsider's 2026 research reinforces these priorities. Among technology leaders surveyed, operational efficiency and cost reduction ranked as the top business priority (70%), followed by revenue growth (57%), data-driven decision-making (36%), supply chain resilience (32%) and workforce transformation (26%).[16]

The infrastructure investment pipeline is adding further momentum. Infrastructure Australia projects $129 billion in transport infrastructure investment,[25] while IFM Investors has identified an infrastructure capex supercycle set to accelerate through 2026 and beyond.[23] This is creating significant downstream demand for asset management, procurement and supply chain capability across both public and private sectors

10.21%
CAGR

projected growth of Australia's supply chain management market from 2026 to 2034 (IMARC Group)

KEY TAKEAWAY

The ANZ operating environment demands that supply chain, EAM and procurement functions do more than manage day-to-day operations. They must build the visibility, resilience and automation foundations to navigate a decade of structural change.

SECTION 2

Enterprise Asset Management: the Transformation Agenda

For organisations in energy, utilities, manufacturing, mining, transport and infrastructure, asset performance is not a back-office function - it is the foundation of operational and financial performance. Enterprise asset management in ANZ is undergoing transformation, driven by predictive technologies, cloud deployment and the scale of Australia's infrastructure investment pipeline.

Downtime Costs Drive AI Adoption

Australia's EAM market was valued at USD 167.5 million in 2024 and is expected to reach USD 451.5 million by 2030, representing a CAGR of 18.2%.[3] Globally, the EAM market is projected to grow from USD 5.87 billion in 2025 to USD 9.02 billion by 2030, with the Asia Pacific region identified as the fastest-growing market.[5] Within this, cloud EAM is the fastest-growing deployment segment, as organisations move away from on-premise systems toward scalable, connected platforms.[3]

US$ 452M

expected market value of Australia's EAM market by 2030

Predictive Maintenance and AI Adoption

The predictive maintenance market in Australia was valued at USD 254 million in 2024 and is expected to reach USD 1,620 million by 2033, growing at a CAGR of 22.86%.[4] This growth reflects the recognition that reactive maintenance strategies, fixing equipment after it fails, are no longer economically sustainable for asset-intensive operations.

The cost of unplanned downtime is substantial across sectors. Unplanned downtime can cost Australian industrial operators up to A$349,000 per hour, driving urgency for predictive EAM across asset-intensive industries.[26] In manufacturing, plants report up to 30% reduction in machine downtime when predictive EAM is implemented effectively. Energy and utilities operators face similar pressures, with ageing grid infrastructure and generation assets requiring increasingly sophisticated condition monitoring. Approximately 52% of Australian businesses now report using AI in some capacity.[1]

A$ 349K

per hour cost to Australian industrial operators from unplanned downtime

The Infrastructure Supercycle

IFM Investors has identified an infrastructure capex supercycle set to accelerate in 2026,[23] creating massive demand for reliable asset management across transport, energy, water and social infrastructure.

For organisations managing these assets, the imperative is clear: build EAM foundations that can scale with the investment pipeline while delivering the reliability and compliance outcomes that stakeholders and regulators require.

67%

prioritise operational efficiency over cost in warehouse selection

KEY TAKEAWAY

EAM in ANZ is shifting from a compliance-driven discipline to a strategic capability. Predictive analytics, cloud platforms and AI-enabled asset data are the enablers, but success depends on data quality, workforce adoption and integration with maintenance and supply chain execution.

SECTION 3

Supply Chain Management: From Lean to Resilient

The supply chain orthodoxy of the past two decades, built around lean, just-in-time, cost-optimised models, is being rewritten. ANZ supply chain leaders are now managing for resilience as much as efficiency, rethinking sourcing strategies, investing in warehouse automation and preparing for a logistics landscape transformed by e-commerce, infrastructure investment and geopolitical realignment

Rewiring Supply Chain Resilience

Sourcing diversification and trade friction

The China-plus-one diversification strategy is now widespread among Australian businesses, as organisations seek to reduce single-source risk and respond to shifting trade dynamics.[13] International trade and tariffs have climbed to a top-three challenge for 29% of supply chain professionals,[2] reflecting the growing complexity of cross-border operations. The New Zealand government procurement market alone is worth $50 billion per year,[15] highlighting the scale of public-sector supply chain activity across the region.

A$63B

online purchases in Australia in 2024; 1 in 7 goods bought

Logistics automation and warehouse investment

Australia's logistics automation market was valued at AUD 1,818.8 million in 2025 and is expected to reach AUD 4,370.7 million by 2034, growing at a CAGR of 10.23%.[12] This trajectory is being accelerated by major private-sector investment: DHL invested AUD 150 million to automate Australian warehouses with 1,000 robots in December 2024, signalling the scale of commitment to warehouse automation.[14]

The shift in warehouse selection criteria reflects this broader trend: 67% of supply chain leaders now prioritise operational efficiency over cost when selecting warehouse facilities,[2] indicating that throughput, technology-readiness and scalability are overtaking rental cost as decision drivers.

67%

prioritise operational efficiency over cost in warehouse selection

Cost and Freight Optimisation

Some 81% of Australian supply chain leaders expect to lower freight costs by at least 5% by 2030 through technology adoption and network optimisation.[14] Infrastructure Australia's $129 billion transport infrastructure pipeline[25] will reshape logistics corridors, while the continued growth of e-commerce (online purchases now account for 1 in 7 goods bought in Australia, exceeding $63 billion in 2024)[14] is driving demand for faster, more flexible fulfilment networks.

KEY TAKEAWAY

ANZ supply chains are being redesigned for resilience and responsiveness, not just cost efficiency. Sourcing diversification, warehouse automation and digital planning are the strategic levers, and the organisations that invest now will be best positioned for the infrastructure and e-commerce-driven demand ahead.

SECTION 4

Procurement: The AI-Powered Transformation

Procurement is undergoing its most significant transformation in a generation. The function that was long defined by cost savings and compliance is now being reshaped by artificial intelligence, process orchestration and the strategic imperative of supply continuity. In Australia, the pace of change is particularly striking.

AI Adoption Accelerating

Half of procurement professionals in Australia now use AI in their roles, and 80% of procurement leaders say AI will have a major or moderate impact on their function.[6] Globally, 43% of organisations are actively pursuing AI deployment in procurement, nearly double the prior year, and 76% report AI-driven improvements of 25% or more in key performance metrics.[7][8]

The applications are increasingly specific: 48% of Australian AI users apply it to procurement strategies and business cases,[6] while AI-enabled technology has entered the top three procurement priorities globally for the first time.[7] The Hackett Group reports that 80% of procurement executives identify AI-enabled technology as the most transformational trend over the next five years.[7]

50%

of procurement professionals in Australia already use AI in their roles

76%

of organisations report AI-driven improvements of 25%+ in key metrics

Procurement Shifts from Speed to Orchestration

The productivity challenge

AI adoption is not happening in a vacuum; it is being driven by necessity. Procurement workloads are expected to increase 8 to 10 percent in 2026 while headcount and budgets remain flat or decline.[7] At the same time, 68% of procurement leaders in Australia report that challenges have increased over the past year.[6] Technology investment is expected to rise approximately 6% in 2026 as organisations seek to close the gap between rising demands and constrained capacity.[7]

8-10%

expected increase in procurement workloads in 2026, while headcount and budgets stay flat or decline

From automation to orchestration

The conceptual shift in procurement technology is moving from automation, doing existing tasks faster, to orchestration: coordinating workflows, data and decisions across the entire source-to-pay lifecycle. ProcureTECH 2026 and the Procurement and Supply Australasia (PASA) community have identified orchestration as a key operating model concept for procurement in 2026.[10]

Australia's regulatory landscape is also evolving. The National AI Plan released in December 2025 is shaping an AI procurement framework that addresses governance, risk and responsible use,[22] ensuring that procurement teams adopting AI do so within an increasingly defined policy environment. Supply continuity has been identified as the number one procurement priority for 2026.[7]

KEY TAKEAWAY

Procurement in ANZ is at an inflection point. AI adoption is accelerating, but the organisations that capture real value will be those that pair AI with strong data foundations, process orchestration and governance, not those that simply automate existing workflows.

SECTION 5

Workforce: The Human Constraint

Technology transformation and investment are only half the equation. Across energy, utilities, mining, manufacturing and infrastructure, ANZ organisations face a workforce challenge that threatens to constrain operational capacity and slow the adoption of new systems and processes.

Mining and Resources: an Acute Shortage

The mining sector's skills shortage has escalated dramatically, rising from 34% of companies reporting shortages in 2021 to 63% in 2022, and the gap remains acute.[11] Mining engineers face the lowest fill rate across all occupations at just 42%,[11] and nearly half of mining engineers are expected to retire within coming years.[21] At the same time, up to 35,400 new jobs are projected in mining by 2028.[21]

Mining employment peaked at 304,965 in 2023 before declining slightly to 300,047 in 2024, reflecting the difficulty of attracting and retaining skilled workers despite strong demand. A survey by the Mining and Automotive Skills Alliance found that 47% of young people do not know the career options available in mining[11], a finding that highlights the sector's talent pipeline challenge.

63%

of mining companies report skills shortages, up from 34% in 2021

42%

fill rate for mining engineers, lowest across all occupations

Ageing Trades, Shrinking Talent Pipelines

Manufacturing, energy and utilities: capability, not just headcount

In manufacturing, the skills shortage in 2026 is about capabilities, not headcount alone. The hardest roles to fill include robotic engineers, data analysts, CNC machinists and maintenance technicians, the very roles critical to smart factory and digital maintenance adoption.[20] Queensland and Western Australia are showing the strongest manufacturing job growth, driven by defence, critical minerals and food processing.[20] Energy and utilities operators face parallel challenges as ageing workforces and increasingly complex digital systems require a new generation of technically skilled workers.

35,400

new jobs projected in Australian mining by 2028, but the workforce pipeline cannot yet meet demand

The ageing trades workforce

Across mining, manufacturing, energy and utilities, the trade workforce is ageing while fewer apprentices enter the pipeline. This structural constraint affects everything from maintenance execution to asset management capability, and it increases the urgency of digital tool adoption to extend the productivity and reach of the workers organisations can attract and retain.

KEY TAKEAWAY

Workforce constraints are not a temporary challenge; they are a structural condition that ANZ operations must design around. Digital tools, connected workforces and multi-generational engagement strategies are essential to maintaining operational capacity in asset-intensive sectors.

SECTION 6

SAP Transformation: The ERP Imperative

For organisations running SAP as their operational backbone, and that includes the majority of large asset-intensive enterprises across energy, utilities, manufacturing, retail, government and mining in ANZ, the technology transformation agenda is inseparable from the S/4HANA journey. The 2027 end-of-mainstream-maintenance deadline for SAP ECC is creating urgency, but the transition is about far more than a technical upgrade.

Migration Status and Cloud Strategy

SAPinsider's Technology Leader's Strategic Agenda (March 2026) provides the most current picture of the S/4HANA migration landscape. The headline finding is that the market has crossed an inflection point: close to half of technology leaders (45%) are now live on SAP S/4HANA, and a further 17% are mid-implementation.[16] That means the majority of large SAP customers have moved beyond planning and are now focused on optimisation rather than go-live. But the tail is significant. Roughly one in five organisations is still building a business case or has not yet started, and 5% say they plan to stay on their existing system altogether.[16]

Cloud strategy tells a more revealing story. Over half (52%) plan to deploy S/4HANA Cloud Private Edition through RISE with SAP by end of 2027, making it the dominant pathway.[16] Yet a fifth of organisations intend to run a hybrid of cloud and on-premise, and 12% plan to keep ERP in their own data centres. The implication for ANZ asset-intensive organisations is clear: the transition is not simply "move to cloud." It is a complex portfolio decision shaped by data sovereignty requirements, existing infrastructure investments and commercial negotiations with SAP. Those already on S/4HANA via perpetual licences face a particular tension, as they weigh the benefits of cloud ERP contracts against the pressure from SAP account teams to transition. HFS Research found that only 39% of SAP ECC clients had purchased S/4HANA licences as of late 2024,[17] confirming that a substantial portion of the installed base is still weighing its options.

45%

of technology leaders are now live on SAP S/4HANA

2027

end of mainstream maintenance deadline for SAP ECC

AI in the SAP landscape

Despite AI dominating the broader technology conversation, adoption within the SAP ecosystem remains early and cautious. Nearly half of organisations (48%) are still at the exploration and pilot stage, and close to a quarter (23%) have no meaningful AI or ML activity in their SAP environment at all.[16] Only 8% describe AI as strategically embedded across business functions.[16]

This gap between intent and execution is the defining challenge. Deployment of Joule or embedded AI ranks as the third most important SAP initiative for 2026 (38%), and the use cases organisations are pursuing, intelligent automation in ERP processes, predictive analytics, document processing and supply chain planning, are firmly operational rather than experimental.[16] The ambition is there. But the barriers are structural, not aspirational. More than half of organisations (53%) cite the difficulty of integrating AI into existing SAP processes as the primary obstacle.[16] Skills shortages and the inability to articulate a clear business case each affect nearly half (48%), and data quality concerns remain a persistent drag (38%).[16]

For supply chain, EAM and procurement leaders, the practical takeaway is that AI-driven gains in areas like demand forecasting, predictive maintenance and spend analytics will depend on solving the data and integration problems first. Organisations that use the S/4HANA migration as an opportunity to address these foundations will be better positioned to realise AI value than those that treat migration and AI as separate initiatives.

38%

cite Joule or embedded AI deployment as a top SAP initiative for 2026

53%

cite the difficulty of integrating AI into existing SAP processes as the primary obstacle

Budget, Priorities and Challenges

The investment picture is cautiously positive. Six in ten organisations report that SAP budgets will increase in 2026, with less than a fifth expecting any decrease.[16] Where that money goes reveals a clear pattern: the top priority is optimising the existing S/4HANA environment (43%), closely followed by analytics modernisation (40%).[16] The next tier of priorities, including AI deployment, process automation, BTP adoption and data quality management, all cluster in the 31 to 38% range, suggesting that leaders are spreading investment across a broad front rather than placing concentrated bets.[16]

Technology leaders face significant organisational challenges. The top challenges for a majority of leaders relate to aligning IT and business stakeholders (51%) and managing costs while delivering transformation (49%).[16] A further third are juggling keeping pace with technology change, measuring SAP investment value and balancing innovation with operational stability.[16]

SAP's strategic direction

SAP's own direction adds context to these findings. The launch of Business Data Cloud in early 2025 signals a push toward a unified data foundation, directly relevant to the data quality challenges organisations are wrestling with. SAP has also elevated supply chain to a dedicated focus area within its portfolio, signalling increased investment and executive attention.[17] For ANZ organisations in asset-intensive sectors, this means the tools and roadmaps for supply chain, EAM and procurement within S/4HANA are likely to receive more rapid development. But SAPinsider's finding that only 31% of organisations currently prioritise data quality and master data management[16] suggests many will struggle to take advantage of these capabilities without first addressing the data foundations that underpin them.

KEY TAKEAWAY

The S/4HANA migration is a strategic inflection point, not just a technology upgrade. ANZ organisations must use the transition to address process debt, improve data quality and build the foundations for AI-enabled operations, or risk carrying legacy constraints into a new platform.

SECTION 7

Six Priority Themes for ANZ Leaders in 2026

The research and data across the preceding sections converge on six priority themes that are shaping the operational agenda for supply chain, EAM and procurement leaders across Australia and New Zealand. Each theme belongs to a primary discipline and is grounded in independent industry evidence. These trends informed the sessions at Mastering SAP Connect Gold Coast 2026, curated to address the most pressing questions and give members actionable knowledge for their day-to-day work.

THEME 01

Building Reliable Asset Operations Through Better Data, Maintenance and Execution

For operations leaders across ANZ, this represents one of the most significant challenges shaping investment and planning decisions in 2026. Poor asset data, reactive maintenance culture and disconnected systems are universal, structural issues validated by independent research across every asset-intensive sector.

Australia's EAM market is growing at 18.2% CAGR to USD 451.5 million by 2030,[3] with predictive maintenance capability an important element in EAM software evaluations as it can result in 30–40% cost savings.[5] Yet the foundations remain fragile. For Australian industrial operators, downtime costs up to A$349,000 per hour[26] and maintenance accounts for approximately half of all mining opex.[37] In energy and utilities, ageing infrastructure and growing regulatory requirements are placing similar pressure on asset reliability. SAPinsider's 2026 research finds that 31% of organisations cite data quality, data governance and master data management as a planned SAP priority, underscoring the gap between aspiration and execution.[16] Organisations lose an average of USD 12.9 million annually to poor data quality. EY's 2026 mining risks report identifies "siloed operating models, little integration between operations and maintenance, and poor inventory optimisation" as key cost and productivity drivers.[29]

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- SAP Trek: Deep Dive 90, A Space Odyssey to Better EAM
- Cleaning Up Asset Master Data with AI
- Deep Diving into SAP's Strategy for Service and Asset Management
- Connecting Parts Availability to Equipment Reliability

THEME 02

Scaling Digital Maintenance and Closing the Workforce Gap

For ANZ operations leaders, closing the workforce gap through digital maintenance is not a future aspiration but an operational necessity. The convergence of an ageing workforce, rising technical complexity and growing asset portfolios makes this one of the most urgent priorities for 2026.

The skills shortage across asset-intensive industries continues to intensify. In mining, the shortage has risen from 34% to 63% of companies,[11] with mining engineers facing the lowest fill rate across all occupations at just 42%.[11] An estimated 86% of mining executives report difficulty recruiting and retaining skilled employees.[31] In manufacturing, the hardest roles to fill, including robotic engineers, data analysts and maintenance technicians, are the very roles critical to digital maintenance adoption.[20] Energy and utilities operators face parallel pressures as digital twins, cloud-based monitoring and predictive algorithms become part of everyday maintenance. Almost half of all mining companies plan to invest in predictive maintenance in the next two years,[35] and Anglo American reduced downtime by 75% through predictive maintenance.[36] The workforce is ageing while fewer apprentices enter the pipeline; digital tools are the only scalable response.

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- How BlueScope Got Teams to Adopt Digital Maintenance
- Leading a Workforce That Spans Generations
- The Human Side of the Future of Work

THEME 03

Moving from Reactive to Resilient Supply Chain Planning

For supply chain leaders across energy, manufacturing, retail, government and mining in ANZ, the shift from lean to resilient planning is the defining strategic question of this decade.

Some 47% of Australian industrials report active supply chain disruptions,[1] while only 9% report high supply chain visibility.[2] That means 91% of ANZ organisations are flying partially blind at a time when volatility demands better decision-making. Some 44% of manufacturers are raising resilience investment in 2026,[1] 68% cite rising costs as their primary concern,[2] and the China-plus-one diversification strategy is widespread.[13] The supply chain management market in Australia is projected to grow at a CAGR of 10.21% from 2026 to 2034.[12] In New Zealand, business confidence sits at a 12-year high, with 56% of manufacturers expecting improvement.[28]

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- From Reactive to Proactive Inventory Planning at Origin Energy
- How VELUX Stabilised Inbound Supply
- Standardising Operational Decision-Making at Zespri

THEME 04

Designing Scalable Warehousing and Connecting the MRO Supply Chain

For operations and supply chain leaders managing complex asset portfolios across ANZ, warehouse automation and MRO optimisation represent two of the highest-impact investment areas for 2026 and beyond.

Australia's logistics automation market is valued at AUD 1.82 billion and growing to AUD 4.37 billion by 2034 at a CAGR of 10.23%.[12] DHL invested AUD 150 million in warehouse robotics across Australia,[14] and 67% of supply chain leaders now prioritise operational efficiency over cost in warehouse selection.[2] Meanwhile, MRO supply chains across mining, energy, utilities and manufacturing face persistent challenges: unplanned stockouts, bloated inventory, weak master data and long lead times.[19] BHP has deployed predictive analytics across its MRO and spare parts procurement to reduce unnecessary spending, achieving a projected 20% cost reduction across haul fleet maintenance.[19]

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- Designing SAP EWM for Speed, Scale, and Multi-Customer Operations
- Building a Greenfield FMCG Plant with S/4HANA and EWM
- Top 10 Minefields in the MRO Supply Chain
- Enabling the Supply Chain that Asset Managers Want
- Using Collaboration to Level Up Asset Management and Supply Chain

THEME 05

The Procurement Productivity Imperative: Doing More with Less Through AI and Orchestration

For procurement leaders across energy, manufacturing, retail, government and mining in ANZ, the productivity imperative is clear. Rising workloads, flat budgets and increasing complexity demand a fundamentally different operating model built around AI and orchestration.

Half of Australian procurement professionals already use AI,[6] and 76% of organisations report AI-driven improvements of 25% or more in key performance metrics.[7] AI-enabled technology is now a top-three procurement priority for the first time,[7] with 80% of executives identifying it as the most transformational trend over five years.[7] Some 43% of organisations are actively pursuing AI deployment, nearly double the prior year.[8] Yet procurement workloads are expected to increase 8 to 10 percent while budgets remain flat or decline.[7] The concept of "orchestration" is replacing "automation" as the key operating model concept, reflecting the shift from task-level efficiency to end-to-end workflow coordination.[10]

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- The Future of AI Native Procurement
- Realize Increased Procurement Value with AI Capabilities in SAP Signavio

THEME 06

Transforming Procure-to-Pay for Speed, Compliance and Control

For procurement, compliance and operations leaders across ANZ, the convergence of regulatory reform, sustainability mandates and digital transformation makes procure-to-pay modernisation a compliance necessity, not just an efficiency play.

Supply continuity is the number one procurement priority for 2026.[7] The regulatory environment is converging on procurement: Commonwealth Procurement Rules were overhauled in November 2025, the most significant reform in nearly a decade.[33] New Zealand Government Procurement Rules have been updated and a new tendering platform launched.[15] The National AI Plan released in December 2025 is shaping AI governance for procurement.[22] Modern Slavery Act enforcement is tightening, net zero Scope 3 reporting became mandatory from January 2025, and cyber security has been reframed as a supplier risk.[33] New Zealand government procurement alone is worth $50 billion per year.[15] P2P automation is trending toward hyper-automation, AI-driven spend analytics and agentic AI across source-to-pay workflows.[10]

RELATED SESSIONS AT MASTERING SAP CONNECT GOLD COAST 2026

- The Future of AI Native Procurement
- The Evolution of Procure-to-Pay

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What to do next...

The challenges mapped in this report, from supply chain resilience and asset management to AI-powered procurement and workforce transformation, are not theoretical. They are being addressed by real organisations, at real scale, right now.

Join supply chain, EAM and procurement leaders from across Australia and New Zealand for two days of practical sessions, real-world case studies and peer-to-peer learning.

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