

2026 Report

The Future of Logistics Intelligence



FedEx®

Introduction

Global supply chains are feeling the strain as geopolitical tensions, shifting trade policies, rising customer demands, and rapid advances in AI-driven technologies collide.

Whether organizations are moving clothing, cars, or life-saving medical supplies, these pressures cut across every industry and supply chain, forcing organizations to rethink operations and accelerate their pace of change.

To understand how organizations are responding, FedEx surveyed 700 leaders in logistics and supply chain, operations, IT, ecommerce, and customer experience (CX) roles at large enterprises across North America, Europe, and Asia-Pacific (APAC).

The findings show that organizations are being pushed to deliver goods faster, more transparently, and with greater resilience than ever before. This pressure is accelerating the need for logistics intelligence — the ability to integrate data from across the logistics ecosystem and unlock predictive, AI-driven insights that support smarter decision-making at every stage of the journey.

Key findings



of decision-makers agree that logistics and supply chain inefficiencies result in significant annual costs for their organization.



of leaders agree that visibility alone is no longer enough to compete in logistics, and their organization needs actionable logistics intelligence to stay ahead.



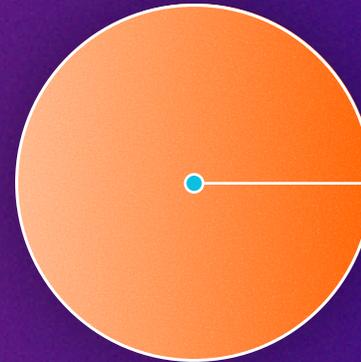
of decision-makers say their teams are **always** able to intervene to minimize the impact when shipments are delayed.



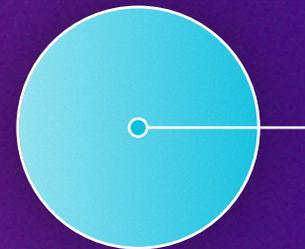
of leaders point to reliable delivery windows as the top priority for customers in the shipping experience.



of decision-makers agree their returns process builds customer trust and loyalty.



Only 59% of organizations use data proactively to predict and prevent issues



25% use it reactively



11% use it for visibility into current issues



Differentiation

Visibility is table stakes,
logistics intelligence
is the real differentiator

Differentiation

Most leaders express confidence in their supply chain visibility. Yet, the data reveals a clear gap between perception and reality.

Nearly all respondents (97%) agree they can track every shipment from origin to delivery, and 94% agree they have unified visibility across all their shipment modes, with over half (53%) agreeing strongly. Healthcare stands out with 78% strongly agreeing they have end-to-end visibility, the highest of any sector.

These numbers make clear that visibility is now a given. Despite this confidence, just 22% of decision-makers say they have access to all the logistics and supply chain data types they want. Without complete, unified data, the level of visibility leaders believe they have is nearly impossible to achieve at scale. Logistics intelligence depends on that same data foundation to make visibility actionable, highlighting the gap between leaders' confidence and their actual capabilities.

The data access gap



Just **22%** of decision-makers have access to all the logistics and supply chain data types they want, revealing a clear opportunity to strengthen the data foundations true visibility depends on.



Differentiation

Many organizations also juggle fragmented systems that hinder visibility and limit how effectively they can use their data. In fact, **66% of organizations use three or more systems to manage shipments**, while only 4% use a single solution. Beyond limiting visibility, this fragmentation slows the adoption of AI-powered logistics tools that depend on clean, unified data streams.

So, it's no surprise that decision-makers rank “too many disconnected systems” and “difficulty integrating logistics systems with other business systems” among their top system pain points [Fig. 1].

As a result, **only 43% of respondents say all relevant teams have consistent, timely access to logistics data**. In other words, most organizations struggle to keep everyone aligned and informed when it matters most. Operations leaders are least likely to report full visibility, suggesting those closest to daily processes are the ones who see the biggest gaps.

And while achieving visibility is now table stakes, most leaders recognize that visibility alone won't keep them competitive:

97%

agree their organization needs actionable logistics intelligence to stay ahead, with 62% **strongly** agreeing.

Fig. 1

Top pain points with current logistics and supply chain data systems

35% Difficulty integrating logistics systems with other business systems

33% Limited ability to customize or configure systems for unique operational needs

31% Inefficient manual processes (e.g., spreadsheets, phone/email updates)

29% Lack of real-time data or updates

26% Too many disconnected systems



APAC's visibility paradox

Most APAC respondents (**84%**) strongly agree they have **end-to-end shipment visibility** — higher than both Europe (62%) and North America (59%). APAC teams are also more likely to report complete visibility into logistics and supply chain data across business functions (65%, compared to 39% in Europe and 36% in North America).

But high visibility doesn't necessarily translate to operational simplicity or efficiency. APAC decision-makers are nearly twice as likely as their peers in North America and Europe to juggle five or more tools for managing shipments (19% vs. 9%). Additionally, **48% of APAC leaders strongly agree that inefficiencies are driving up annual supply chain costs**, outpacing Europe (38%) and North America (33%).

Strongly agree: Inefficiencies drive up costs



The APAC experience underscores the fact that even robust visibility and high data confidence don't eliminate operational complexity or cost pressures. True logistics intelligence is needed to turn data into action.

Customer demand

Customers demand
logistics intelligence
at **every touchpoint**

Customer demand

Customer expectations continue to raise the bar for logistics and supply chain performance, and visibility is only the starting point. Decision-makers say reliable delivery windows (36%) and end-to-end shipment tracking (34%) matter most to their customers, along with proactive communication and transparency around sustainability and shipping costs.

What matters most to customers?



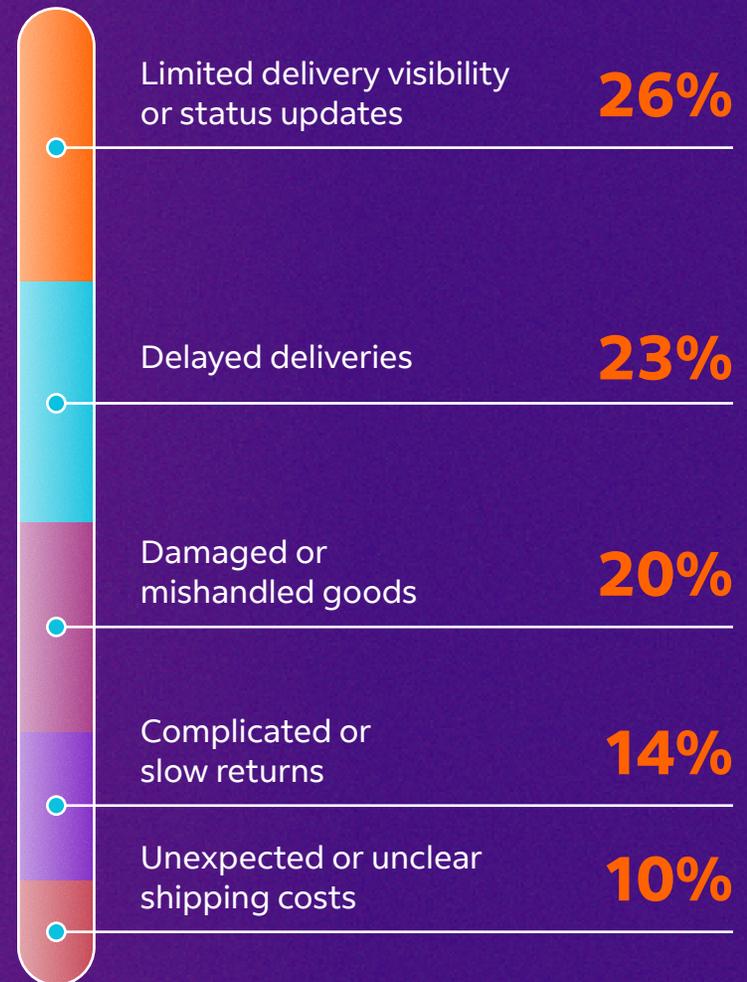
Meeting these demands requires logistics intelligence that brings together data from shipment scans, location tracking, and internal order and fulfillment systems, transforming it into predictive, AI-driven insights teams can act on.

When organizations fall short, customers notice. Limited delivery visibility or status updates (26%) and delayed deliveries (23%) top the list of shipping-related complaints [Fig. 2].

The consequences of these gaps come full circle. When delays occur, organizations face **higher costs to serve (53%)**, **increased strain on service teams (47%)**, and **a rise in customer complaints (46%)**. This closed feedback loop reinforces the need for logistics intelligence that helps teams keep promises and protect profitability in an environment where every customer touchpoint counts.

Fig. 2

Top 5 shipping-related customer complaints



Top shipping-related customer complaints by industry



Automotive:

Damaged or mishandled goods



Retail/e-commerce:

Delayed deliveries



Healthcare:

Limited delivery visibility or status updates



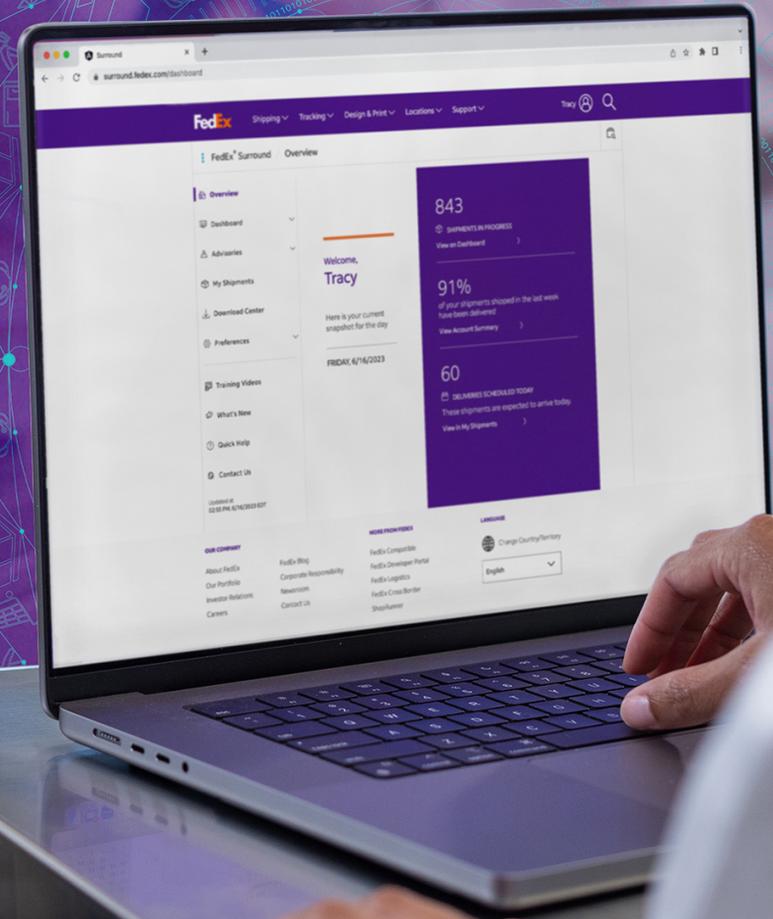
Manufacturing:

Limited delivery visibility or status updates



Tech:

Delayed deliveries





Returns:

Where CX and cost efficiency collide

Nearly all decision-makers (**93%**) agree their returns process builds customer trust and loyalty, with 48% strongly agreeing. The share that strongly agrees climbs to 69% for CX professionals, reflecting their frontline exposure to how returns influence the customer experience.

Because of this, even small issues in the returns process can create an outsized impact. When returns break down, 53% of organizations experience higher operational costs, and 48% report a direct hit to customer satisfaction and loyalty.

When returns break down



Processing and managing returns is also the third most resource-intensive post-shipment task, trailing only investigating shipment delays and handling customer inquiries.

With returns representing both a CX moment of truth and a major operational lever, organizations must equip teams with the intelligence to streamline workflows and deliver a more predictable, customer-friendly experience — without increasing the cost to serve.

Systems

Disconnected systems and manual processes hinder **logistics intelligence**

Systems

Achieving true logistics intelligence requires more than access to data. It's about generating actionable insights and the ability to act quickly when disruptions occur.

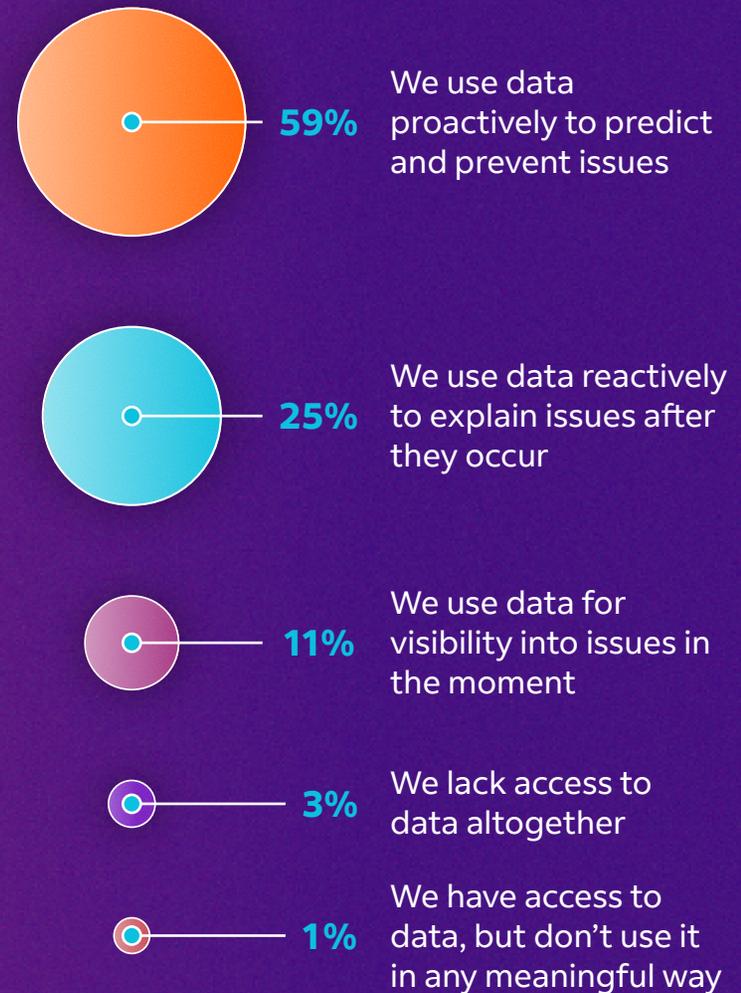
But most organizations still struggle to generate the near-real-time, AI-supported insights that make proactivity possible. While 59% of decision-makers say they use data proactively to predict and prevent issues, many still rely on reactive approaches or use data only for in-the-moment visibility [Fig. 3].

That gap also shows up in how effectively teams can respond. **Only 44% are very confident they can respond quickly and accurately to customer shipment inquiries using logistics data.** Confidence is highest among ecommerce professionals (68%), while operations (39%) and customer experience teams (34%) trail behind, suggesting that not all teams have the same access to or confidence in the tools and data needed to respond effectively.

Additionally, responding to customer inquiries about shipment status, like "Where is my order?" (WISMO), was the second most resource-intensive post-shipment task (21%). **The top challenge was tracking down the root cause of shipment delays or disruptions, cited by 30% of respondents.**

Fig. 3

Organizations' current use of logistics data



Systems

These limitations become even more apparent during disruptions. Just 18% of decision-makers say their teams are always able to intervene when shipments are delayed. The biggest barriers to timely intervention include systems that don't allow flexible rerouting or expediting (34%) and lack of visibility into the exact root cause (23%) [Fig. 4]. Fragmented data, delayed alerts, and manual investigation also slow down response times.

Limited ability to act



Critically, **32% of organizations lack predictive risk insights**, such as alerts for potential weather delays. Without the insights, predictive capabilities, and operational levers needed to act on them, proactivity remains elusive, reinforcing the need for AI-enabled insights in logistics.

Fig. 4

Top 5 reasons teams struggle to intervene

35% Carrier or third-party systems don't provide flexible options to reroute or expedite shipments

33% We lack sufficient visibility into the exact location or root cause of the delay

31% Delay alerts arrive too late to take meaningful action

TIE Manual investigation and coordination slow down response times

29% Data is siloed or fragmented across too many systems

26% We lack resources or staffing to monitor and act on disruptions in real time



4 ways AI enhances **logistics intelligence**

With robust data foundations in place, AI tools can:

1. Predict disruptions earlier and more accurately

By correlating shipment history with external variables to identify where delays are most likely to occur.

2. Identify root causes faster

By detecting anomalies across systems (e.g., location mismatches) and surfacing the most likely disruption drivers.

3. Reduce alert fatigue

By translating high-volume data like shipment scans and status events into focused summaries that spotlight true exceptions and limit manual review.

4. Recommend smarter interventions

By weighing rerouting options, customer impact, cost tradeoffs, and operational constraints to surface the most effective next steps.

Future-readiness

Built to last:

How organizations are preparing for the future of logistics intelligence

Future-readiness

Most organizations report feeling prepared to tackle a range of supply chain challenges in the coming year, but a closer look reveals that “somewhat prepared” is more common than “very prepared” across nearly every category [Fig. 5]. This pattern suggests that while many teams have a baseline level of readiness, few feel fully equipped to navigate the volatility ahead.

Fig. 5

Top readiness concerns for organizations

	1 Very unprepared	2 Somewhat unprepared	3 Somewhat prepared	4 Very prepared
Rising transportation costs	3%	12%	54%	32%
Managing growing supply chain complexity	2%	16%	44%	38%
Managing the impact of tariffs and changing trade policies	4%	21%	41%	35%
Managing supply chain disruptions	2%	17%	46%	35%
Meeting my organization’s internal sustainability goals	2%	12%	43%	42%
Complying with sustainability-related laws and regulations	1%	12%	43%	44%
Modernizing outdated logistics systems and technology	1%	10%	47%	42%

Respondents feel most prepared to comply with sustainability-related laws and regulations (87% at least somewhat prepared) and to modernize outdated logistics systems and technology (88%). Modernization stands out as a strategic priority since these investments lay the groundwork for more advanced capabilities such as AI-driven forecasting and workflow automation.

What respondents feel most prepared for



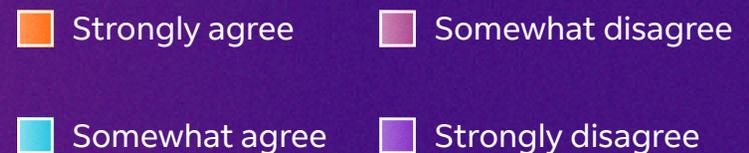
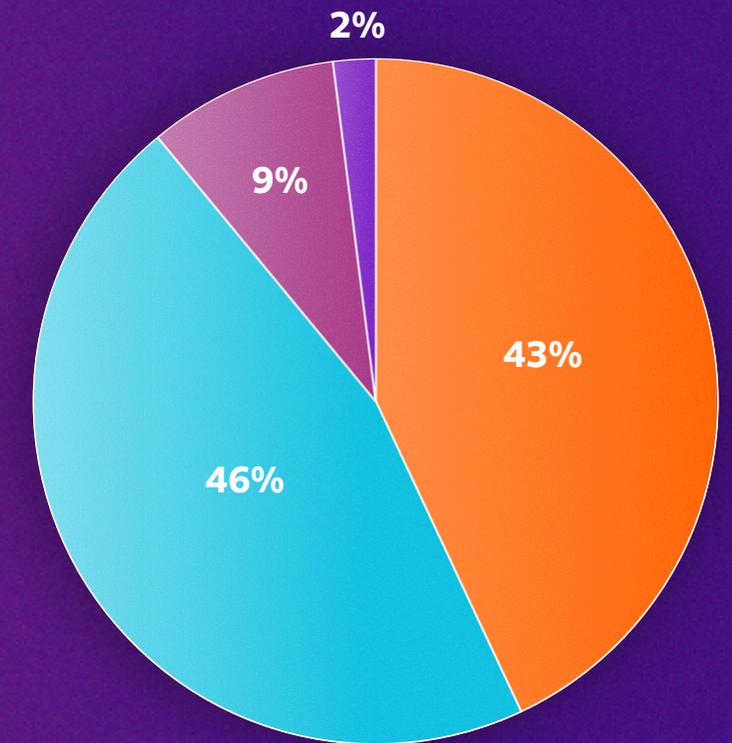
Still, uncertainty persists, particularly when it comes to external forces. Tariffs and trade policies top the list of unknowns, with **24% of organizations saying they feel unprepared**, more than for any other challenge.

In response to shifting U.S. tariffs and evolving trade policies, organizations have taken a range of actions in the past year that include rerouting shipments through alternative countries or ports (45%), absorbing higher costs internally (43%), increasing compliance and documentation processes (43%), and passing higher costs on to customers (41%).

Even with this baseline of preparedness, many organizations still lack full confidence in their ability to keep pace with what's next. While 89% agree their logistics systems are "future-proof," i.e., able to adapt to shifting customer expectations, compliance demands, and market conditions, just 43% strongly agree, underscoring that future readiness remains a work in progress for much of the industry **[Fig. 6]**.

Fig. 6

Degree to which respondents agree or disagree their logistics systems are future-proof





Future-readiness

also varies across industries, regions, and teams:

By industry

Nearly half of retail/ecommerce (**46%**) and automotive (**49%**) professionals strongly agree their systems are ready for future demands. However, manufacturing respondents are more cautious: Only 39% strongly agree, and 14% express some level of disagreement.

By region

APAC stands out with **61% strongly agreeing their logistics systems are future-proof**, compared to 39% in North America and 35% in Europe.

By department

Only 28% of operations professionals strongly agree their systems are future-proof. That's well below peers in IT/Digital (42%), logistics/supply chain (49%), ecommerce (64%), and customer experience (54%).

While some sectors, such as tech, and some regions, such as APAC, show higher confidence in their ability to adapt, no organization is fully future-ready. As trade policies shift, customer expectations rise, and supply chain complexity grows, the gap between current capabilities and true resilience will define tomorrow's leaders.

The organizations that combine connected data with AI-powered logistics solutions will define the next era of supply chain performance.

Take your first steps toward **logistics intelligence**

Try these strategies to move beyond basic visibility and start building true logistics intelligence.

These steps lay the groundwork for a more adaptive, resilient supply chain. With this foundation in place, your organization will be better positioned to respond to new challenges and seize opportunities for growth.



Audit

Audit your logistics and supply chain data for accuracy, completeness, and timeliness. Address any gaps or inconsistencies.



Analyze

Analyze recent disruptions, delays, or customer complaints and map how your team responded at each stage. Use these insights to pinpoint recurring obstacles that limit proactivity or slow resolution.



Translate

Translate your findings into a shortlist of your most urgent operational barriers, then prioritize them for action.



Inventory

Inventory all systems and manual processes used across teams in your logistics and supply chain operations. Identify opportunities to consolidate or streamline.



Align

Align with cross-functional leaders on what actionable insights each team needs, and establish practical steps (e.g., automated alerts, escalation paths, or shared dashboards) to drive timely action.



Explore

Explore digital, AI-powered solutions that can bridge remaining gaps and support smarter, faster data use.

Resilience begins with **intelligence**

Despite signs of progress, most organizations still face gaps between what they see and what they can do, especially as shifting customer expectations, government regulations, and trade dynamics raise the bar for visibility, transparency, and proactivity.

Closing these gaps requires moving beyond reactive fixes to strategies that embed AI-driven insight into every stage of the journey, accelerating decision-making and strengthening resilience.

By bringing together data, technology, and teams, organizations can anticipate issues earlier, respond faster, and deliver the consistency customers expect. Those that embrace intelligence-led logistics will be the organizations that thrive in the next era of global commerce.

Ready to take the **next step?**

Explore the FedEx suite of digital solutions to see how logistics intelligence can transform your supply chain operations.



Methodology

In October 2025, FedEx surveyed 700 full-time professionals at the director level and above in operations, logistics and supply chain, IT, ecommerce, and customer service roles at organizations with 500 or more employees. Respondents represented companies that ship physical goods across sectors including but not limited to healthcare, manufacturing, automotive, ecommerce, aerospace, and technology (hardware/electronics). Participants were distributed across three geographic regions: 150 from Asia-Pacific (APAC), 150 from Europe, and 400 from North America.

