

Automation Investment Trends

2026: The Trend Picture

Where capital is flowing, where it's being pulled back, and the questions that will define the panel discussion

Panel Preparation Briefing | August 2026



SupplyChain FORUM

September 8 - 10, 2026

Loews Kansas City Hotel Kansas City , Mo.



What We'll Cover

Five trend threads, then the panel questions they raise

01

Selective, not blanket, investment

AI, robotics and simulation are now core spend for most manufacturers

02

A real capacity-discipline counter-trend

Under-utilization is tempering capex, especially in food & beverage

03

Retail automation is bifurcating

DC/manufacturing robotics vs. e-commerce fulfillment pull-backs

04

AI concentrating in high-ROI entry points

Demand forecasting leads; data infrastructure is the gating factor

05

Panel questions: 15 across 4 themes

Current ROI, measuring it, future bets, and sequencing risk

Investment Is Real — But Increasingly Selective

Automation has shifted from experiment to essential operating spend.

A Rockwell Automation survey found manufacturers now treat AI, robotics, and simulation as necessary for long-term survival — not optional pilots. Budgets increasingly cover controls modernization, predictive maintenance, and vision-based quality assurance as core operational spend, not experiments.



70%+

of manufacturers call AI, robotics & simulation essential for survival



+16%

North American robot orders for food & consumer goods, Q1 2026 (units)

Takeaway: capex is concentrating on operational, ROI-defensible use cases — not broad automation for its own sake.

A Real Counter-Trend: Capacity Discipline

Food & beverage manufacturing is running under-utilized, and it's tempering automation spend

77.6%

Fed-reported food & beverage capacity utilization in June — below the long-run average, near 2009 recession levels

1 in 3

CPG manufacturers (of 1,000+ surveyed in 2026) carrying 31%+ unused capacity

-27.5%

First-half 2026 capex at a leading CPG company vs. the same period last year, as it normalizes spend to 4–5% of sales

14.9%

AI adoption rate in food manufacturing — trailing manufacturing overall by 5+ points, expected to stay flat



The nuance: the CFO of a leading CPG company attributes white-collar cost savings less to new technology than to standardizing fragmented processes across functions and regions — before automating them. Discipline and automation are running in parallel, not in conflict.

Retail Automation Is Bifurcating

Manufacturing / DC robotics keeps expanding; e-commerce fulfillment is more contested



THE CAUTIONARY TALE

A leading retailer is closing three automated fulfillment centers built with Ocado

Expects to gain roughly **\$400M** in e-commerce profitability by shifting toward in-store, capital-light fulfillment and third-party delivery partners.

“Automation wasn't delivering desired results everywhere” — interim CEO



STILL SCALING

Amazon is piloting a 50,000-sq-ft micro-fulfillment center near Chicago.

Walmart is testing Symbotic's SymMicro MFCs.



McKinsey's read

The technology works. Proven tools — electronic shelf labels, self-checkout, shelf-scanning robots, automated backroom unloading — could cut store labor hours **55–65%** with returns above historical hurdle rates.

The gap is execution speed — not capability.

AI Automation Is Concentrating in a Few High-ROI Entry Points



The highest-ROI starting point

Demand Forecasting

AI-enabled forecasting is cutting errors **up to 50%** in some categories — reducing both stockouts and wastage.



The gating factor

“Infrastructure First”

A lot of automation projects fail not because robots break, but because the underlying data infrastructure wasn't ready.

This is driving ERP modernization — SAP S/4HANA migrations among CPG's highest IT priorities.

Other Notable Threads



Pricing intelligence goes company-wide

Pricing intelligence and MAP (minimum advertised price) compliance are becoming automated, company-wide capabilities rather than isolated tools.



Trade policy risk on the horizon

A White House ban on foreign robot sales has been flagged as a possible constraint on logistics automation projects.



POTENTIAL PANEL QUESTIONS

15 Questions, Four Themes

- 1 Current opportunities — what's already paying off
- 2 Measuring and defending ROI
- 3 Future opportunities — where the next payback?
- 4 Sequencing and risk to the payback clock

1

Current Opportunities

What's already paying off

Of everything deployed in the last 18 months, what's the single automation investment with the clearest, most defensible ROI number — and what was the actual time-to-payback, start to finish?

Demand forecasting keeps coming up as the “easy win” entry point for AI. Did the payback timeline match what you pitched internally, or did it take longer to show up in working capital and stockout numbers?

Which automation investment surprised you by paying back faster than modeled, and what made it move faster than the business case predicted?

Where has “proven” technology — self-checkout, electronic shelf labels, vision-based quality inspection, robotic palletizing — still not delivered the return the case studies promised, and what explains the gap?

2

Measuring and Defending ROI

How the business case gets built, and who signs off

How do you draw the line between hard ROI (labor hours, waste reduction, inventory carrying cost) and softer benefits (data infrastructure value, agility, resilience)? Does finance accept the soft case, or must everything clear a hard payback threshold?

What's a realistic time-to-ROI window your organization now uses for automation capex — 12 months, 24, 36? Has that window gotten longer or shorter as you've gained experience?

A leading retailer wrote off a significant automated fulfillment investment; a major CPG is pulling back capex despite public robotics commitments. When does a slow-to-mature investment get another budget cycle versus get cut — and who decides?

How much of your ROI shows up in places the original business case didn't predict — and how do you build in room to discover that instead of walking away too early?

3

Future Opportunities

Where the next payback comes from

If demand forecasting was the highest-ROI starting point of the last cycle, what's the equivalent low-risk, high-return entry point for the next 12–18 months — and why hasn't everyone moved on it already?

Agentic workflow automation and digital twins are described as “accelerating fast” toward 2030 but still early. Are you investing ahead of the ROI curve now, or waiting for someone else to prove the payback first?

Where do you see automation ROI compressing (getting faster) versus stretching out (getting slower) over the next two years, and what's driving each direction?

Is there an opportunity everyone on this panel agrees is coming but nobody has funded yet — and what's the trigger that would unlock investment?

4

Sequencing and Risk to the Payback Clock

What can accelerate — or blow up — the ROI timeline

How much of your time-to-ROI is eaten by data and systems readiness before the automation itself even goes live — and has that hidden cost changed how you sequence projects?

With food and beverage capacity utilization running below 78% industry-wide, how do you separate genuine productivity ROI from automation that's just consolidating existing underused capacity?

What external risk — trade policy, robot/component sourcing, labor market shifts — is most likely to blow up your current ROI assumptions? Are you building contingency into the payback model, or just hoping it doesn't happen?

The Thread Running Through It

- Capital is following defensible ROI, not automation for its own sake
- Readiness — data infrastructure, standardized process — increasingly gates the payback clock
- The next cycle's winners will be the low-risk, high-return entry points nobody has funded yet