

# Between the lines of the hype curve

AI ambitions and on-the-ground realities

Hamburg, 25 June 2025





# The Present

How close are you already to realizing the future?



# Moves Forward

What stands between today and the future?

Where in the process do we implement AI?



What AI tool do we implement?



How do we engage people to implement and use AI?





# First Move

## Identify AI use cases through process focus

### Procurement core processes

Plan-to-strategy (P2S)

Source-to-contract (S2C)

Purchase-to-pay (P2P)

Supplier Management (SM)

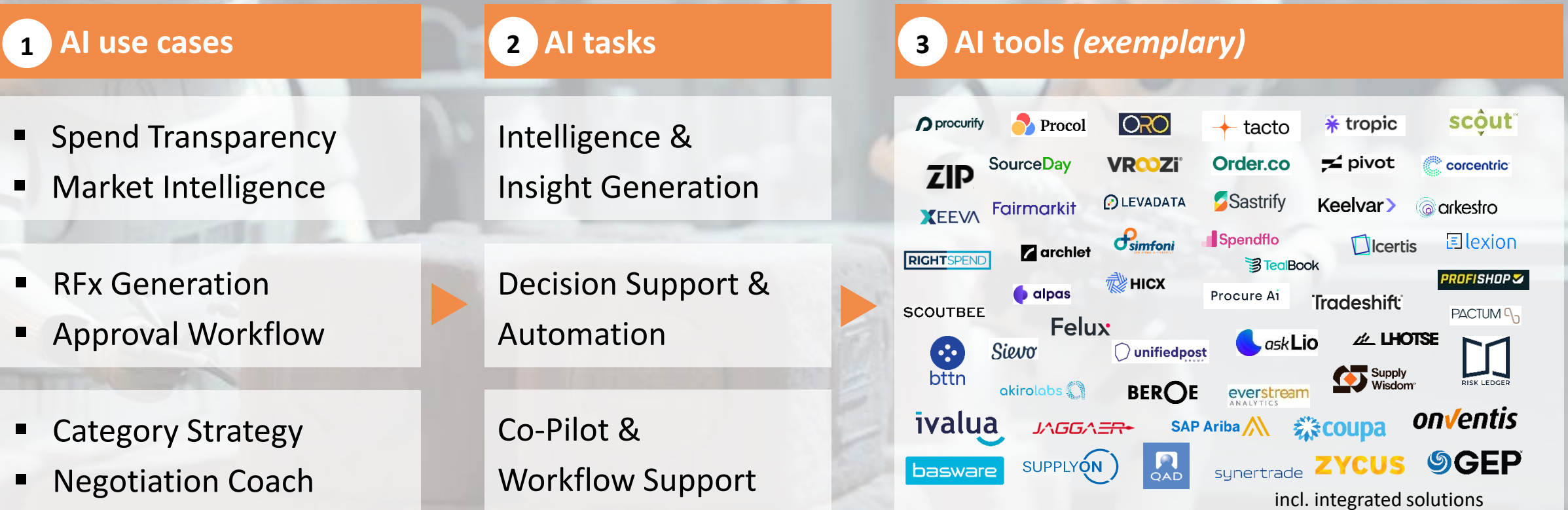
### AI use cases for procurement tasks (*exemplary*)



Today, the true ROI of AI in procurement lies in targeted process improvements—and both impact and implementation effort depend on how mature those processes are.

# Second Move

## Select the right AI tool for the right tasks



Not every AI is smart – and not every procurement task needs “smart” AI.  
Match tool capability to context.

# Third Move

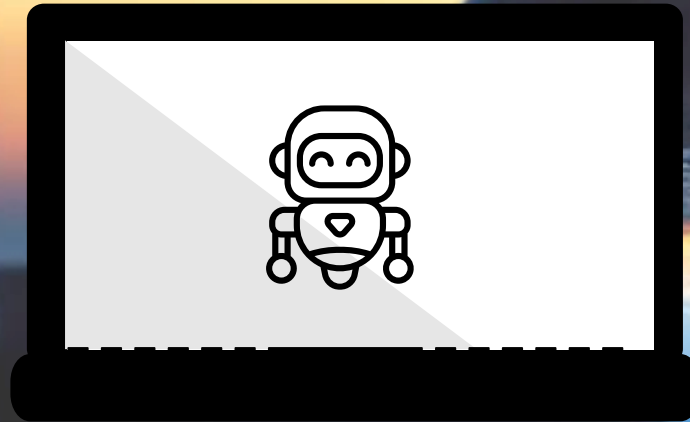
## Let the team lead the AI adoption

New role	Description	Responsibilities
	Specialist	Developing and deploying AI applications, optimizing data
	Translator	Supporting AI development to ensure use cases meet procurement needs
	Practitioner	Using AI applications to deliver on procurement priorities

It's not AI that creates value in procurement – it's the people who develop and apply it with purpose.

# Today's possibilities

## AI beyond the hype



Good morning!

Here is your **negotiation blue sheet** triggered by **decreases in raw material indices!**

Should I **launch an autonomous negotiation** with Supplier A?

Support Layer

Automated Basic  
Decisions

Demand Forecasts

ESG  
Intelligence

Market Intelligence

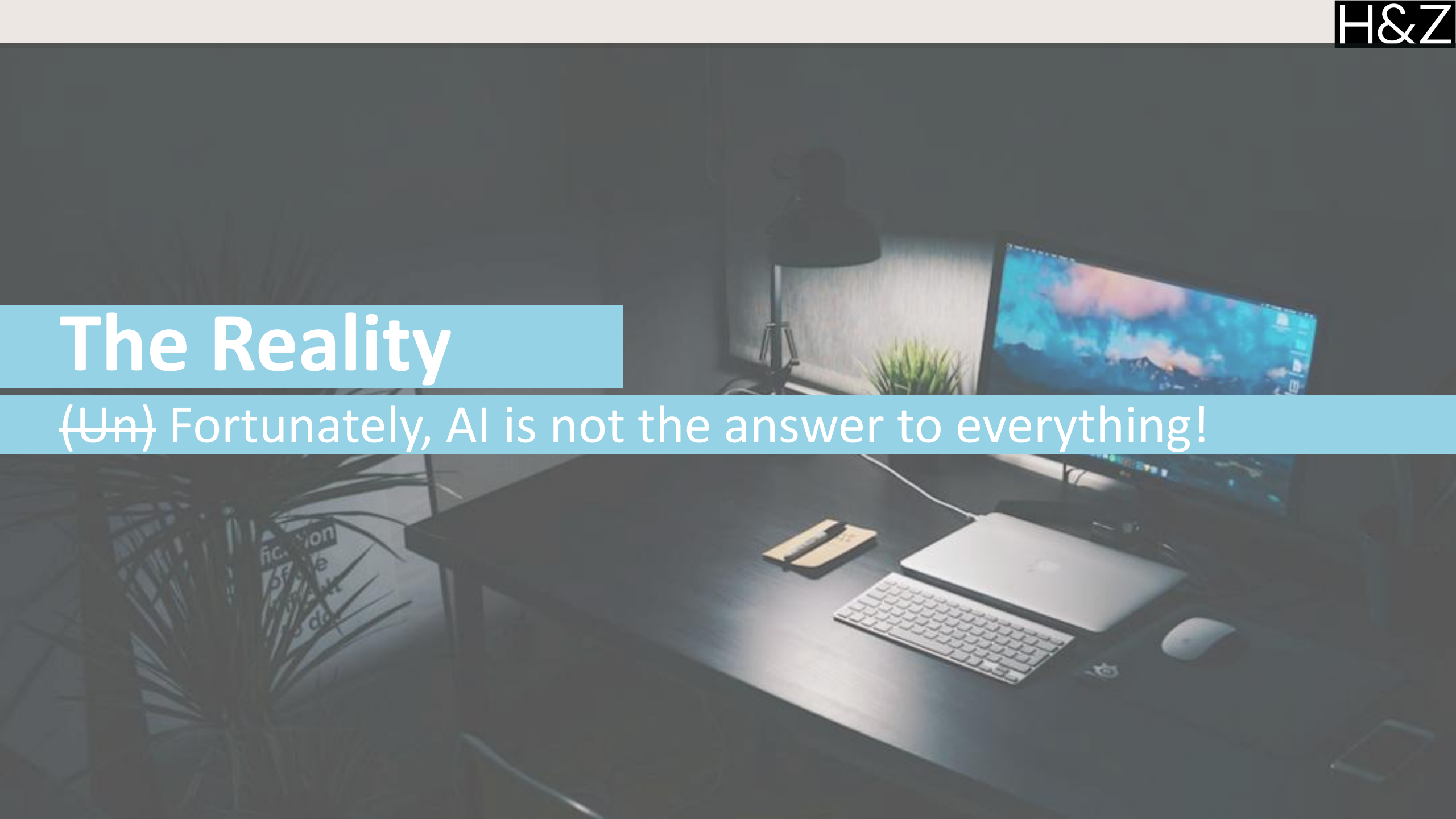
AI Business Integration

AI architecture integrating data from disparate systems (ERP, CLM, CRM...)



# The Reality

(Un) Fortunately, AI is not the answer to everything!



# Complex Problems

## Rising complexity of procurement beyond AI

**Axios Event: U.S. pharmaceutical supply chain is in crisis, experts say**

Press release 9 April 2025

**Experts Expect Inflation Rates to Rise Worldwide**

BUSINESS EXCLUSIVE DETAILS

**Why China's mineral monopoly has emerged as key obstacle in US tariff talks: 'They hold virtually all of the cards'**

**Trump trade war with China revives recession, bear market fears**

By Jeff Mason, Philip Blenkinsop and Joe Cash

April 10, 2025 11:51 PM GMT+2 · Updated 25 days ago



BUSINESS EXCLUSIVE DETAILS

**Why China's mineral monopoly has emerged as key obstacle in US tariff talks: 'They hold virtually all of the cards'**

**Building a circular economy: challenges and opportunities for infrastructure**

24 FEB. 2025 | BY MATTHEW CALVELEY

**Rising prices, war rooms and layoffs: The cost of Trump's tariffs is coming**

Retailers, wholesalers and distributors say shifting U.S. trade policies have led to pervasive uncertainty as they gear up for back-to-school and holiday orders.

June 5, 2025 at 6:00 a.m. EDT



**Explainer: The reality of Trump's steel and aluminium tariffs**

*How One of the World's Biggest Ships Jammed the Suez Canal*

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**Aggressive reshoring of supply chains risks significant GDP loss, warns OECD**

Economy | Houthis

**Houthi Red Sea attacks still torment global trade, a year after October 7**

Yemen's rebel group has launched some 130 attacks in the crucial waterway since the start of the war in Gaza.

**Hang Seng index, FTSE 100 fall with global markets on trade uncertainty; oil climbs on geopolitical risks**



# Strategic Solutions

## How to adapt to tariffs and trade wars?

Trump trade war with China revives recession, bear market fears

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**Why China's mineral monopoly has emerged as key obstacle in US tariff talks: 'They hold virtually all of the cards'**

Supply chains [+ Add to myFT](#)

**Aggressive reshoring of supply chains risks significant GDP loss, warns OECD**



# Global Retraction

Protectionist policies have changed the game

Pre-Covid

Post-Covid

Present Day and Near Future

**Global Sourcing**

*Scale and cost advantage*



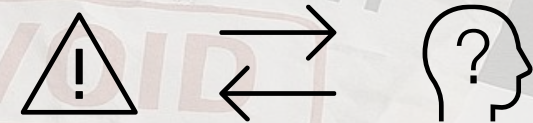
**Nearshoring Surge**

*Be closer to your end-customer*



**Tariffs & Protectionism Impact**

*Balance cost, reliability, and flexibility*



The rise of tariffs, especially with the recent 2025 trade policies, is forcing procurement organizations to further prioritize their resilience strategy over cost optimization

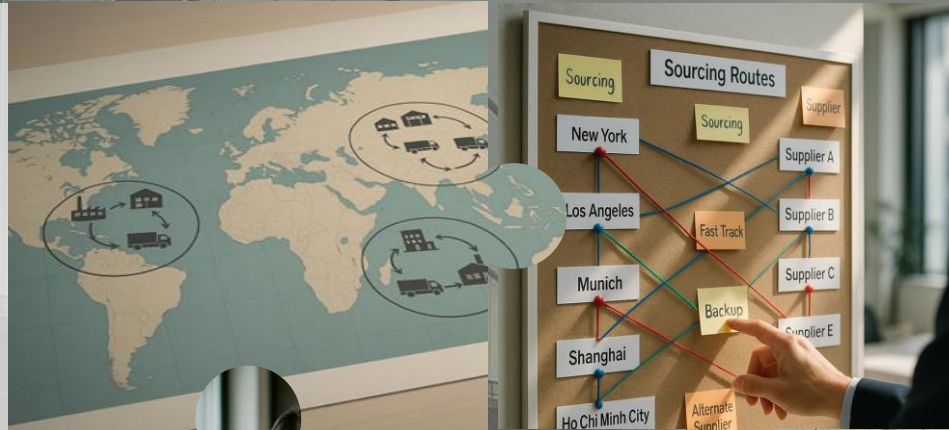


# Strategic Responses

## Building blocks of resilience

### Regionalization

Shifting production closer to key markets



### Agile & Flexible Sourcing Alternatives

One supplier with multiple locations, dual sourcing, planning security

### Strategic Supplier Partnerships

Fostering greater stability, flexibility, and win-win scenarios



### N-tier Supply Chain Transparency

Early warning and proactive mitigation

# Stronger Together

The role of support and trust in resilience

Shift from price focus to partnership building

Resilience across the full supply chain

Collaborative cost optimization

Supplier support as competitive advantage





# The Summary

## AI enables, not replaces, strategic procurement

### The Future: bright

AI offers real opportunity for procurement — but only with the right intent and direction



### The Present: needs structure

Value of AI depends on focus — where we do it, what we do, and how we make it work.



### The Reality: procurement endures

Strong procurement fundamentals still matter more than ever



## SUPPLIER SELECTION

SUPPLIER	STRENGTHS	WEAKNESSES
Supplier	★★★★★	██████████
Inventory	★★★★★	██████████
Rost	★★★★★	██████████
Copy	★★★★★	██████████
Spolter	★★★★★	██████████

## AI IN PROCUREMENT

## INVENTORY



## RISK RATING



# And You?

How prepared are you to navigate into the future of procurement, beyond the hype?

# Let's discuss!

...come and meet us at booth B24.





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