

The Executive Briefing: Top Healthcare Trends Steering 2026 Supply Chain Strategy

138%
increase

**in total revenue
between 2019 & 2024**

Healthcare supply chain leaders enter 2026 facing sustained margin pressure, structural labor shortages, and accelerating expectations to modernize operations at an enterprise scale. While large acute-care hospitals experienced an average 138% increase in total revenue between 2019 and 2024, supply expense growth outpaced revenue, with med/surg supplies costs rising 151%, and pharmacy costs increased 185% over the same period. Fewer than 40% of large hospitals saw an improvement in net operating margin during that timeframe, bringing supply chain performance squarely into board-level conversations.

151%
rise

**in costs for
med/surg supplies**

185%
increase

**in costs for
pharmacy**

What we're seeing with clients:

Health systems are no longer being asked simply to “reduce supply costs.” Executive teams are asking supply chain leaders to connect savings to the income statement, understand cost and revenue drivers, diversify risks, demonstrate structural control over spend and inventory, standardize processes, and work with IT to establish AI governance and policies. Supply chain has become one of the few remaining enterprise levers with meaningful impact on margin stabilization across supplies, services, and capital. Despite financial challenges, leading health systems plan to proactively invest in 2026 to reap financial gains in 2026 and beyond.

People: Labor Constraints Are Now an Operating Model Risk



Labor pressures remain one of the most disruptive forces shaping healthcare supply chain operations in 2026. Vacancy rates across sourcing, contracting, logistics, and operations roles remain elevated, and healthcare EBITDA margins are forecasted to continue declining through 2026–2027, intensifying pressure to reduce labor spend while maintaining service levels.

Traditional, transaction-heavy supply chain structures and processes are no longer sustainable.

Source: Definitive Healthcare

What we're seeing with clients:

Organizations are increasingly acknowledging that traditional, transaction-heavy supply chain structures are no longer sustainable. Many systems are actively consolidating supply chain functions, centralizing sourcing, contracting, purchasing, logistics, and enterprise decision support. Leaders recognize that without this shift, investments in automation and AI will stall due to lack of internal capability and governance. 2026 is the year of standardization, streamlining, and prioritizing automation and AI needs for the future.

Process: From Hospital-Centric Operations to Enterprise Control



Care delivery continues shifting beyond hospital walls into ambulatory surgery centers, home health, and retail care – introducing new complexity in final-mile logistics, inventory visibility, and service expectations. In response, health systems are accelerating the integration of procurement, logistics, contracting, and analytics into unified enterprise operating models. Processes are changing at a rapid pace with the implementation of cloud based ERPs and AI solutions. However, it is still critical to document guidelines across supply chain functions that support the healthcare organizations goals, as well as streamlined processes.

Tasked with linking spend decisions directly to cost, quality, outcomes, and revenue performance.

What we're seeing with clients:

Supply chain leaders are being tasked with linking spend decisions directly to cost, quality, outcomes, and revenue performance, not just savings targets. Standardization – particularly SKU rationalization and item master data governance – has emerged as a prerequisite for both automation and executive-level transparency. Systems that lack clean data and documented workflows struggle to defend decisions under scrutiny from finance, compliance, and clinical leadership.

Technology: AI Adoption Accelerates – Along with Governance Expectations



Financial strain is accelerating adoption of AI and automation across healthcare supply chains. By 2026, scaled AI deployment is expected to automate executive dashboard creation, demand forecasting, predictive modeling, contract and spend analytics, inventory replenishment, supply and equipment visibility, and data cleansing. This will reduce manual labor, allowing hospitals to re-purpose resources to focus on priority needs. This will also aid in capital asset management to proactively plan equipment maintenance and replacement needs and mitigate unexpected spending.

Increased focused on how AI is governed, not just where it is deployed.

What we're seeing with clients:

While interest in AI is high, executive teams are increasingly focused on how AI is governed, not just where it is deployed. Health systems are formalizing AI policies, risk frameworks, and compliance standards as adoption expands. Emerging technologies such as digital twins, predictive modeling, robotics, ambient listening, and retrieval-augmented generation (RAG) are being evaluated carefully, with leaders balancing innovation against regulatory, clinical, and reputational risk.

What This Means for Executive Leaders in 2026

The defining challenge for healthcare supply chain leaders is no longer whether modernization is necessary – but how quickly people, process, and technology can be aligned to support enterprise priorities, while meeting financial goals.

Based on industry data and what we're seeing with health system clients, leading organizations are planning to:

- Protect operating margins through standardization, spend transparency, and system governance for supplies, purchased services, and capital
- Extend supply chain capabilities beyond acute care settings
- Re-design supply chain roles to support growth, automation, process standardization
- Govern AI adoption and management with the same rigor as financial and clinical systems

Organizations that delay these shifts risk compounding financial pressure, operational fragility, and executive exposure at a time when boards and regulators are demanding clearer accountability.



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