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2026 State of *Supplier Diversity*

PREVIEW

What procurement, sourcing, and supplier diversity leaders told us about resilience, budgets, AI, and the road ahead.



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THE 2026 STORY

Older, leaner, more business-focused, and *under more pressure.*

That is where supplier diversity programs stand in 2026. Programs absorbed new executive orders, tariff shocks, and a wave of new technology, and came out of it restructured rather than diminished.

2025 Leaders saw the pressure coming and planned to adapt. → **2026** The data shows how they did.

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WHO WE HEARD FROM

194 leaders weighed in, and most run established programs

194 procurement, sourcing, and supplier diversity leaders

Most work at large organizations:

36% with more than $5 billion in annual revenue

23% between $1 billion and $5 billion.

MOST REPRESENTED INDUSTRIES

- Financial services (14%)
- Technology (11%)
- Healthcare and life sciences (11%)
- Energy and utilities (10%)



have a program today



are implementing one



have no program

PROGRAMS ARE MATURE

80% are at least three years old. Only 8% are under a year.

The post-2020 wave has aged into the middle bracket, and very few new programs have started behind it.

THE APPETITE HASN'T DISAPPEARED

Of the 27 without a program, 44% support supplier diversity informally and 52% are open to starting one.

Budget (48%) and political or regulatory concerns (37%) are the main barriers.

**Program questions are based on the 167 respondents with or building a program.*

THE BIG PICTURE

Three headlines for 2026



now name political and regulatory change a top-3 challenge. In 2025, 39.6% called it their biggest risk ahead.



are already using AI for discovery, sourcing, or data management. 37% also named data accuracy a top-3 challenge.



name supply chain resilience & competitiveness as their top program value driver, ahead of compliance (53%).

RESPONDENT INSIGHT

"I am the lead for this program, and one role has been eliminated."

Head of Responsible Sourcing and Supplier Inclusion
2026 survey respondent

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PRESSURE POINTS

From "we're insulated" to "we're managing it directly"

2024

BEFORE THE EXECUTIVE ORDERS

“We’re not affected.”

90% said politics wasn't impacting the program; 67% said the same of the economy.

2025

ANTICIPATING

"We expect to be affected."

Political/cultural change became the #1 anticipated 2026 risk (39.6%), ahead of the economy (20.7%) and budget cuts (18.9%).

2026

RESPONDING

"We're actively responding."

53% now name it a top-3 challenge; 47% rebranded due to the political climate; 63% report new compliance concerns from executive orders.

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THE RESPONSE

What repositioning looked like

How the political climate changed programs this year



scaled back public-facing communications



renamed or rebranded the program



shifted framing toward procurement and business value



restructured

1 in 5 had budget reduced

Only 18% reported no change, and that group includes several programs outside the US, where the executive orders don't apply. For nearly everyone else, the response has been repositioning, not retreat.

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THE RESPONSE

The pivot to small and local is already underway

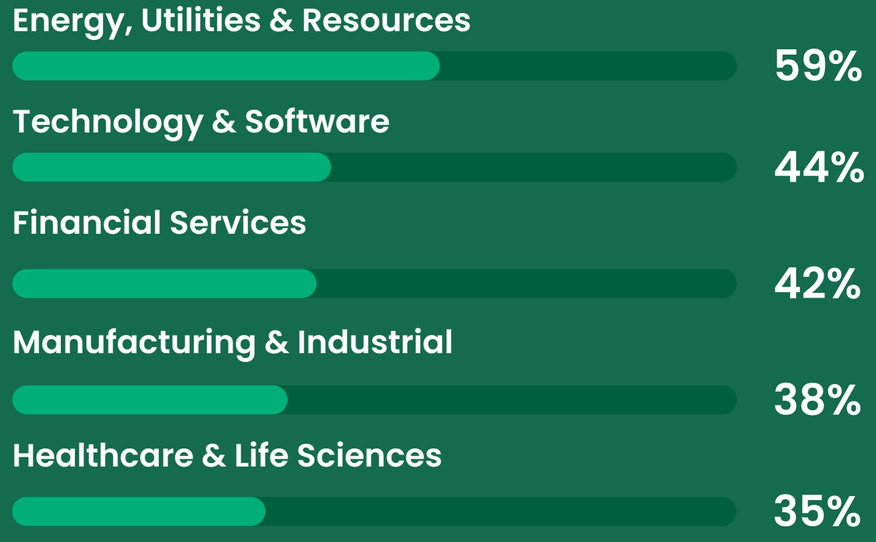


expanded their program to include small or local suppliers more broadly this year

37% increased focus on supply chain resilience; **14%** on near-shoring or domestic sourcing specifically. **65%** say near-shoring is a higher priority than a year ago.

Expanded to small or local suppliers, by industry

Industries with 12 or more program respondents



Spend confirms it. Supplier.io's 2025 benchmark shows small business spend now exceeds women-owned and minority-owned spend combined.

RESPONDENT INSIGHT

"We have always been about added value and community impact, not labels."

Strategic Partners Manager
2026 survey respondent

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WHY PROGRAMS EXIST

The business case has overtaken the values case

Asked why their program exists, leaders put resilience ahead of culture for the first time.

TOP TWO REASONS PROGRAMS EXIST, 2026

Supply chain resilience and competitiveness



76%

Up from 65% last year and 47% in 2019

Alignment with corporate culture



56%

Down from a peak of 81%. The top driver from 2021 through 2024

The first time in *nine reports* that a business driver leads the list.

In the 2025 report, culture alignment led at 67% with competitiveness second at 65%.

This year the order reversed and the gap opened to 20 points.

Asked to pick one category that describes their program's value, DEI and culture, once the default answer, is now last at 9%, with procurement intelligence and supplier optimization leading at 26%.

The change didn't happen this year; this is the year it became visible.
The full report shows the nine-year trend behind it.

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PROGRAM HEALTH

Programs are mature, and leadership is still behind them



of programs are at least three years old

The programs launched in the surge after 2020 have aged into the middle bracket. Only 8% are less than a year old.



rate executive support at seven or higher on a 10-point scale

Last year 87% said support was the same or greater than the year before, and 50.6% expected it to hold through 2026.

Support has been stable in every year this series has measured it. The pressure on programs is external, not internal.

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VISIBILITY

Leaders planned to go public, but fewer did



promoted their results publicly this year

Last year, 56% said they would. Looking ahead, 42% plan to next year and 35% are unsure.

INTERNAL VISIBILITY IS THE PRIORITY

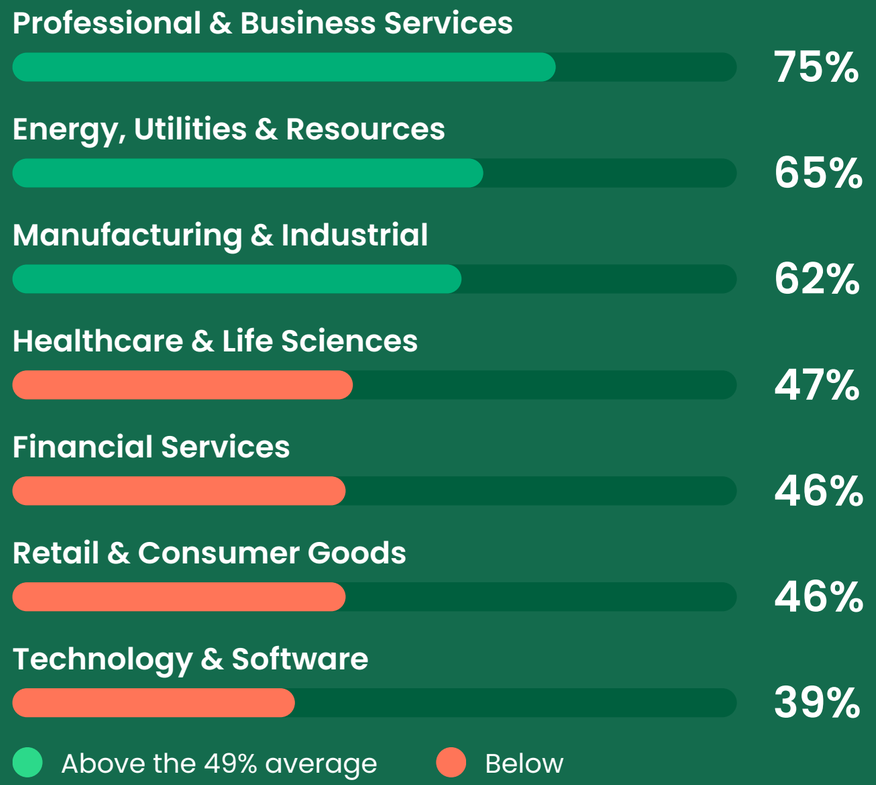
Increasing internal visibility and executive engagement was the top program change this year (44%) and the top plan for next year (43%).

Only 8% indicated that they plan to reduce public communications further.

**Promoted publicly means the program said yes to sharing efforts or results externally in any form, from a dedicated announcement to a mention in a sustainability or impact report. The survey did not ask what was shared.*

Who promoted publicly this year, by industry

Within each industry, the share of programs that promoted publicly this year



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RESPONDENT INSIGHT

"We often say a key part of our role is ensuring diverse and small businesses have a seat at the table, but in many cases, we've made it difficult for them to even find the table."

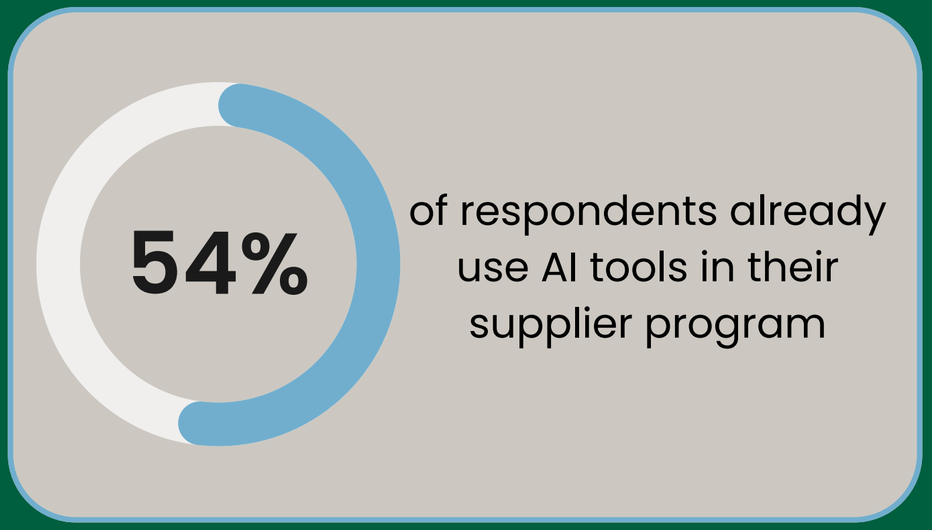
Global Inclusive Procurement Manager
2026 survey respondent

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TECHNOLOGY & DATA

More than half of programs already use AI

Using AI for supplier discovery, sourcing, or data management



Top AI use cases (of AI users)

Multiple responses allowed, so figures do not total 100%.



RESPONDENT INSIGHT

"Corporate-wide, we are being tasked with finding efficiencies through AI tools rather than adding headcount in the traditional way." **– Sr. Manager, Supplier Diversity**

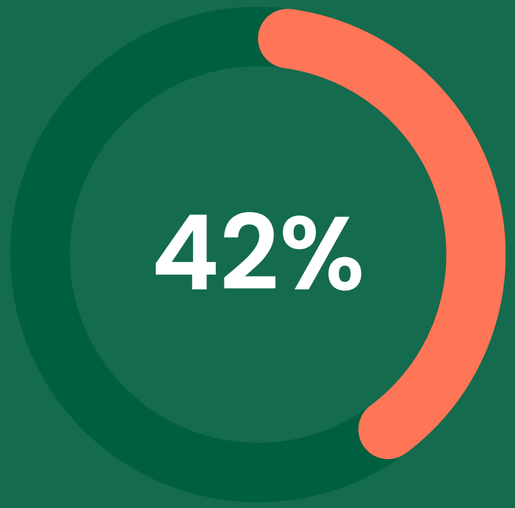
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MEASURING VALUE

The economic impact say-do gap



name driving economic impact in communities as a top program goal



actually track or calculate that economic impact today



already track spend with diverse suppliers, the one metric nearly everyone measures

The opportunity: spend tracking is nearly universal, but the richer economic-impact story most leaders want to tell remains largely unmeasured.

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WHAT WE HELD BACK

The full report goes further

The full report shows the evidence behind the headlines, including:

1. **Nine years of the same question**
   Year-by-year data from 2018 to 2026 on why programs exist, including the moment the business case overtook the values case.

2. **What programs actually changed**
   Renaming, restructuring, budget, and messaging moves leaders made in response to the political climate, and what they plan next.

3. **Five actions for program leaders**
   What the programs reporting the most control in 2026 did differently, and how to apply it to budget requests and executive updates.

We'll send the full report right to your inbox when it's live

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JOIN US LIVE

Hear the full story behind the numbers

2026 State of Supplier Diversity: Pressure, Resilience, and the AI Shift.

November 3, 2026 | 2:00 pm EST



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