

The Voice of Digital Leaders

Manufacturing 2026



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01 Executive summary



This report captures digital transformation as it is lived, through real people making real decisions while markets and technology shift in real time.

It is built on conversations with digital, commercial, service and transformation leaders inside a select group of global manufacturing organizations. These are not retrospective success stories or distant roadmaps. These are judgments being made now, under pressure, without the luxury of certainty.

Volatile demand, geopolitical tension, regulatory pressure, aging technology landscapes, rising customer expectations and the accelerating opportunity around AI are arriving all at once. None of these forces can be addressed in isolation. Together, they compress timelines and narrow the margin for error.

In this environment, digital transformation is about deciding what matters most while conditions keep changing.

Likewise, digital advantage in manufacturing is no longer about having the right answers. It is about making coherent decisions — across experience, organization, data and technology — while pressure mounts.

What separates progress from fragmentation is the ability to make a small number of hard decisions together. Five such decision tensions define today's connected manufacturer. We unpack those in The Connected Manufacturer's Decision Playbook at the end of this report.



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The voices that shaped this report

This fifth-annual edition of The Voice of Digital Leaders in Manufacturing report is built on deeper, more focused conversations than ever before.

Over the course of several months, we conducted in-depth interviews with senior digital, commercial, service and transformation leaders from eight global manufacturing organizations across industrial equipment, chemicals, packaging, safety technology and materials.

These are large, complex businesses operating at global scale, where transformation decisions are shaped by legacy technology, organizational complexity and the realities of running mission-critical operations every day.

The companies represented have a mean annual revenue of nearly €7 billion, placing them among the manufacturing leaders actively shaping the direction of the sector. For this special edition, the research deliberately prioritized depth over breadth. Fewer interviewees, longer

conversations and more space to explore how leaders are navigating volatility and opportunity as it unfolds.

The result is a perspective grounded not in theory or hindsight, but in the lived experience of executives making consequential decisions in real time.

These are the decisions redefining what digital advantage in manufacturing looks like today.



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The voices that shaped this report



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02

The market



Volatility is the operating environment



Under sustained volatility, disconnected organizations don't fail loudly. They drift as their opportunities for growth quietly disappear.

Across interviews, leaders describe the same set of external forces: geopolitical tension, tariffs, shifting trade blocs, inflationary pressure, supply chain reconfiguration, sustainability regulation, the accelerating impact of AI. None of these are seen as isolated events. They're compounding disruptions that shape decision-making at every level.

And digital leaders are trying to decide how to operate coherently and grow in this environment.

Some leaders frame the market primarily as a constraint. In this view, demand is subdued, capital is scarce and margin leakage becomes the central risk. Digital investment is justified when it removes friction, automates manual work or protects contribution margin.

Others frame the same conditions as latent opportunity. They argue that demand still exists but is increasingly captured by those who are easier to do business with, faster to respond and better able to absorb complexity on behalf of the customer. In this framing, digital becomes a competitive filter rather than a defensive shield.

What unites both perspectives is a shared assumption: Waiting for stability is no longer a strategy. The external environment will not simplify on its own. Internal readiness has become the decisive variable.



Challenging
Uncertain
Never seen before
Difficult
Opportunity

One-word market descriptors

As part of the interviews, we asked each participant to describe the current market in a single word or short phrase. The intent was to surface instinctive responses before analysis or explanation set in.

Their answers provide a useful snapshot of how leaders emotionally and cognitively frame the environment they are operating in:

The uniformity of language is striking. Leaders are not struggling to name market pressures. They are making careful decisions about what to do next.