SIGNAL OVER NOISE

MULTIMODAL 2026

NEC BIRMINGHAM UK 30 JUNE-2 JULY

Around 300 exhibitors. Two members of the Altura team. Three days on the floor at the NEC Birmingham. Here is what the conversations actually said about hiring in supply chain and logistics.

Damian Bird
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Busy, And Led By The Challenger Brands.

Multimodal 2026 was busy, but the energy came from a specific place. Early-stage companies and emerging players were out in force, challenging the established names that have led this space for years. Two members of the Altura team worked the floor and read the same signal from different angles. Damian saw the most confident quarter in two years. Jade saw a floor where the start-ups were hiring and the larger players were quietly letting people go. Both things are true, and the gap between them is the story.

~300

Exhibitors at the NEC Birmingham across three days

36%

Of companies added personnel over the past year (Peerless Research Group)

21%

Reported layoffs in the same period, concentrated among the larger players (Peerless Research Group)

31%

Annual growth in demand for supply chain talent

The Challengers Are Setting The Pace

The hiring is not where you would expect. Early stage / start-ups expanding into new regions are doing most of it. The big, listed brands are focused on remaining innovative through AI but are increasingly challenged by smaller, Ai-native competitors. The posture on the floor has shifted from the incumbents to the insurgents.

Confidence, With An Asterisk

The mood was positive, but it was not evenly spread. Where Damian heard bullish growth stories, Jade heard the counterweight: more layoffs at the larger companies, and hiring cycles that are getting harder, not easier, to close. This is a market moving in two directions at once.

Everyone Is Talking About AI. But it’s still work in progress.

In supply chain and logistics the AI conversation has barely started. AI dominated every stage and every booth at Multimodal, but underneath the noise, real deployment is thin and uncertainty is high, especially in freight and customs. The talk has run far ahead of the reality.

Talk Outpaces Deployment

72% of logistics employees adopted AI tools in 2024, the highest rate of any industry (ActivTrak). Yet only 23% of supply chain organisations have a formal AI strategy in place (Gartner). Individuals are experimenting; organisations have not decided what they are doing. That gap is wider here than in almost any other sector.

Freight And Customs Are Holding Back

The uncertainty is loudest in freight and customs, where operators are still unsure how much AI will actually change their day to day. Enthusiasm on stage, caution in the corridors. The people who run these operations want proof before they commit budget.

Warehouse Software Is Moving First

The exception is the WMS space, where warehouse management systems vendors are leaning into AI far more readily than the logistics providers. Where the return on investment is visible and measurable, adoption is real. Where it is still a promise, buyers are waiting.

> “Typically people talk a lot about AI, but are still unsure how it works or how it will impact their business. Companies in the WMS space seem to be leaning into it more than the logistics providers.”
>
> JADE HEARNE, SENIOR CONSULTANT

THE EXCEPTION: CUSTOMS AND TARIFFS

The one place AI has clear ROI is customs and tariffs. Customs and tariff software was one of the hottest categories on the floor, driven directly by the current US tariff environment. 73% of supply chain leaders expect to hit their tariff absorption wall by the end of 2026, the point at which margins can no longer soak up trade costs. Where AI cuts customs clearance costs by around 20% (EY), buyers are moving. Everywhere else, it is still aspiration.

Growth Is Moving To The Edges.

The most striking market signal was where the growth is coming from. It is not the household names. It is the smaller, faster, VC or PE backed companies expanding into new regions, while the larger listed players are primarily the ones announcing layoffs.

Capital and momentum are moving to the edges of the market.

The Two Speed Market

- Start-ups and VC/PE backed vendors are doing most of the hiring, often as they push into new regions
- Larger companies are in retreat, with more layoffs and fewer net-new roles
- Customs and WMS are the two categories with the most movement right now
- Salaries have crept sharply upward, and many companies have not accepted it as the new normal. As one data point from the floor: enterprise supply chain sales base salaries in the Netherlands sat at roughly 115,000 euros four years ago, versus about 140,000 euros now, both on double OTE plus car allowance.

Of supply chain organisations have a formal AI strategy in place, despite AI dominating every agenda and stage at the event. (Gartner)

36% up, 21% down

The split that defines the market: more than a third of companies added people, more than a fifth cut them, in the same twelve months. (Peerless Research Group)

€115k → €140k

The four-year jump in enterprise supply chain sales base salaries in the Netherlands.

(Altura floor intelligence)

What Everyone Is Hiring For, And Cannot Keep.

The demand signal was consistent across conversations, and it was not only about finding people. It was about keeping them. Retention, not sourcing, was the pain that came up again and again. The roles in demand have shifted too, with technical and presales talent rising fastest as vendors move from selling AI to actually building it.

01 **Presales and Technical Roles**

Rising sharply. As buyers move from the pitch to the rollout, vendors need people who can prove the technology works, not just sell it.

HIGH DEMAND

02 **Go-To-Market and New Business Sales**

Still the hardest quality to find. Salaries have jumped, and many companies have not adjusted to the new benchmark.

HIGH DEMAND

03 **Structured Playbook Sellers**

Companies increasingly value a proven sales methodology, such as MEDDIC, over pedigree from a direct competitor. Process is beating provenance.

MID TO HIGH

04 **Product Roles**

Stay hot on the back of AI roadmap work. Every vendor is rebuilding what they sell.

MID DEMAND

05 **Classic Engineering**

Cooling, while interest in data science climbs. The centre of gravity in technical hiring is shifting.

SHIFTING

The Profile Everyone Wants, And Nobody Keeps

Talent that sticks. Businesses are leaning on their own networks to hire and finding it does not always work. Internal recruiting teams are stretched thin across multiple roles and not generating enough quality. Tenure has moved from a nice-to-have to a core requirement, because companies are tired of hiring the same seat twice. In this market, the retention problem and the sourcing problem are the same problem.

The Market Rewards Speed. Europe Is Not Fast.

05

This was the sharpest thing we heard, from both members of the team, and it is the point most competitors are missing. The biggest hiring headache was not budget, and it was not a skills gap.
It was time. Slow, protocol-bound processes are losing the best people to faster offers, and no amount of budget fixes a process that takes too long.

Counter-Offers And Slow Cycles

The single biggest headache Damian heard was counter-offers, companies losing candidates they had carefully selected, who resign and then get bought back. The root cause is simple: there are more open roles than there are excellent people. European hiring cycles are slow and cautious, and a candidate in a six to eight week process will often just take a faster offer. US companies, by comparison, hire in about ten days.

Process Friction

Jade heard the same problem from the other side. Roles are delayed because they have to go through an internal talent team first, or be advertised before an external agency is engaged. Add the shift back toward hybrid and office-based working, now a firm requirement rather than a preference, and the pool narrows further while the clock keeps running.

14 days vs **6 - 8 weeks**

US hiring speed versus the typical European cycle

(Altura floor intelligence)

21%

Of companies reported layoffs while a third were still hiring, a market where the fast movers win the talent the slow movers are losing (Peerless Research Group)

> “Start hiring sooner before an empty seat becomes a bigger cost. And make sure your interview process is streamlined and well thought through before you engage candidates, so you do not lose the best ones. ”
>
> JADE HEARNE, SENIOR CONSULTANT

Two Signals.
The Gap That Says The Story.

We worked the same floor and came away pointing the same way, read from different seats. One saw the confidence and the salary reset. The other saw the retention problem and the process friction.

Put together, the two signals describe a single market with a single instruction: Make brave hiring decisions, do not procrastinate or create hiring drift.

Damian Bird

Co-Founder / MP / Interim Head of RetailTech

> “It is a candidate-driven market. Be competitive, be efficient, and be brave in making decisions. The companies winning right now are the ones prepared to move.”

Damian Bird

Co-Founder & MP

Jade Hearne

Senior Consultant

> “People were more approachable and more forthcoming than before, especially about the hiring problems they are facing. A lot of companies are trying to do all the sourcing themselves, without the right resources or the time to find the right profile.”

Jade Hearne

Senior Consultant

| GET IN TOUCH

Hire Before The Empty Seat Costs You.

The companies gaining ground in supply chain and logistics are not the biggest. They are the fastest, the most decisive, and the ones building teams that stay.

Where the hiring is hardest, in go-to-market, in presales, and in the AI leadership roles reshaping how these businesses run, is exactly where Altura Partners is built to help.

GET IN TOUCH

Speak directly with our team about your hiring priorities for H2 2026

Contact Altura Partners

altura-partners.com

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