



Crowe 2025

Technology in Metals Survey Preliminary Results

How the industry is investing in the future

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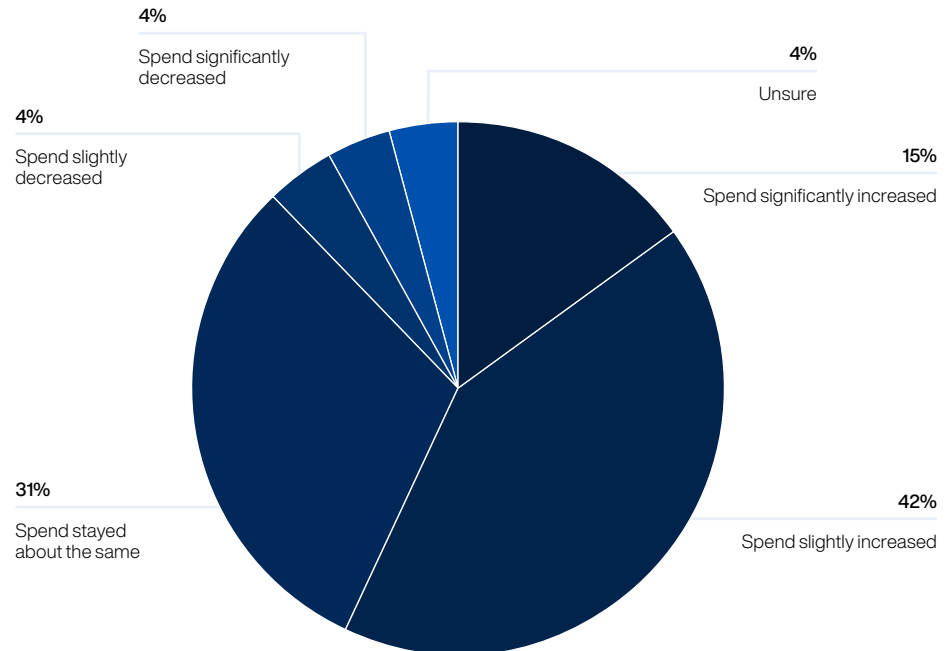
Part 1

Technology investments

Question 1

How have you adjusted your technology and software investment plan spend for 2025 compared to 2024?

More than three-quarters of respondents reported that technology spending remained about the same or changed only slightly compared to last year. While it might be tempting to view this relative stability as the product of recent economic uncertainty, Crowe analysis is that it is more likely the result of many metals firms reaching natural spending plateaus. Metals companies have invested heavily over the last decade plus, and they are increasingly focused on targeted technology investments instead of large overhauls.



Question 2

If your technology investment is increasing in 2025, why?

If your technology investment is decreasing in 2025, why?

Survey respondents offered different perspectives on why investments were increasing or decreasing.

Reasons for increasing technology investments:

"Dealing with legacy systems, many of which are approaching end of life and positioning to extract value from emerging technology (investing in the foundations)"

"Beginning a five-year technology road map toward Industry 4.0"

"Refreshing older network equipment and setting up security enhancements"

Reasons for decreasing technology investments:

"We implemented a new ERP system in 2024."

"We are decreasing spend because we just recently went live."

Question 3

What are your company's biggest digital transformation and technology challenges?

The concept of technology platforms as a key differentiator is not new to the metals industry. Historically, platforms were viewed in silos (for example, shop floor versus back office or sales versus finance). Today, however, leading metals companies approach technology platforms as integrated, end-to-end tools that support enterprisewide transformation. Rather than restricting technology choices ("we must use this tool"), a well-chosen platform serves as the starting point for technology decisions ("why not this platform?").

Survey respondents offered details on specific challenges.

"Getting to a position where we can enable more rapid transformation – for example, modern technology platforms"

"Trying to integrate AI into our platform and gathering 'good' information to produce useful data"

"Legacy systems, data integrations, and resources"

"Finding the time to implement the strategy along with selecting the most conducive platform"

Question 4

Please rank the following factors in order from most important to least important when it comes to making decisions about technology investments.

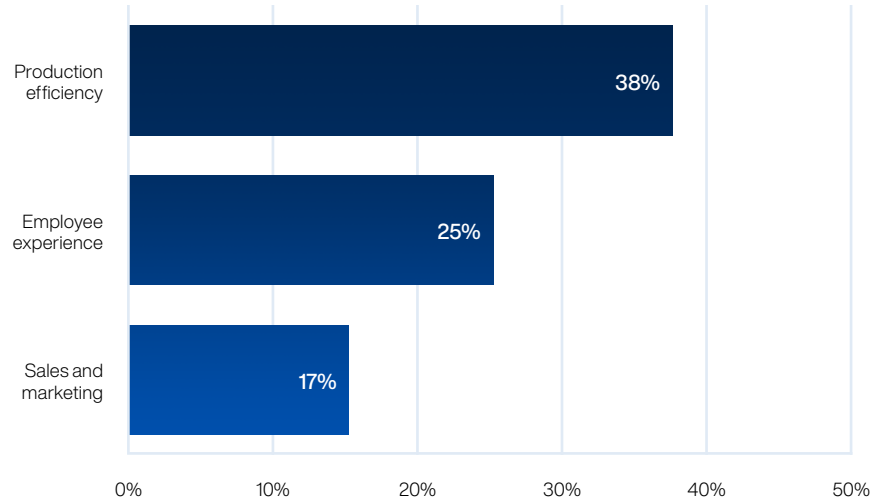
Overall ranking:
1 = most important; 6 = least important

- 1 Customer needs and requirements
- 2 Employee experience (including recruiting and retaining employees)
- 3 Age of existing technology
- 4 Total cost
- 5 Competitor investments
- 6 Analyst perspective and rankings

Question 5

What area of your business has been most affected by investments in technology?

Top three responses:





Part 2

Digital transformation

Question 6

What measures have you found effective for increasing technology adoption among your employees?

Survey respondents found success with technology adoption by employing various measures.

"Training as well as open and positive culture for change"

"Dedicated change management focus, including bringing the most credible employees into the project teams to support design, testing, training, and advocacy"

"Tribe mentality. Find a champion who embraces the new technology, communicates the advantages of the new technology, and mentors employees into using it. Once a few employees embrace it, the rest will follow."

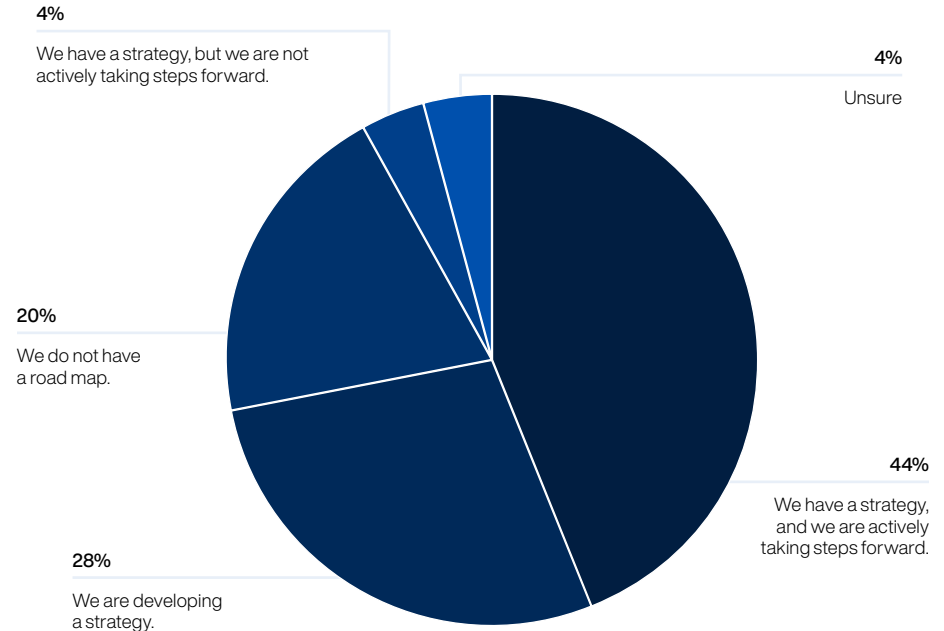
"You need executive leadership to explain value, and you need stakeholder involvement."

"We use a carrot-and-stick method. We remove old tools when replacing with new ones, and we communicate like crazy about the value of adopting the new tools."

Question 7

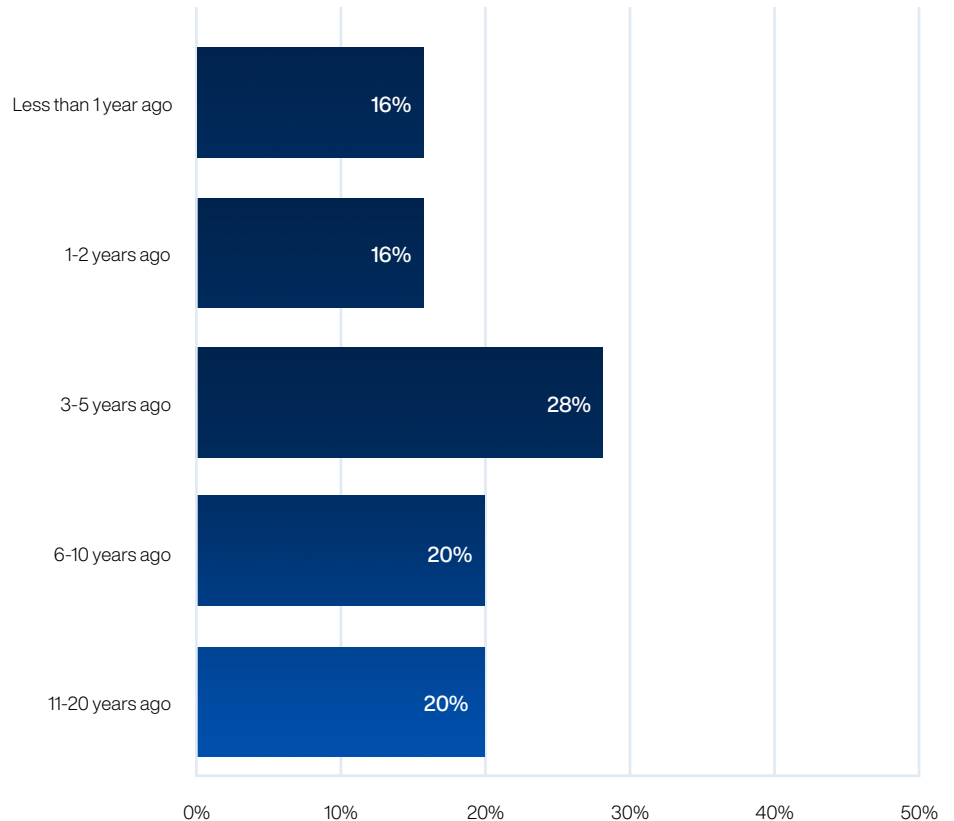
Where are you on a digital transformation road map?

These responses demonstrate that most metals companies today are already somewhere on their digital transformation journey, whether they're automating complex processes or just beginning to lay the groundwork. For those that still haven't started, the window of opportunity to move before being left behind is rapidly closing.



Question 8

When was the last time you upgraded your enterprise resource planning (ERP) system or implemented a new ERP system?



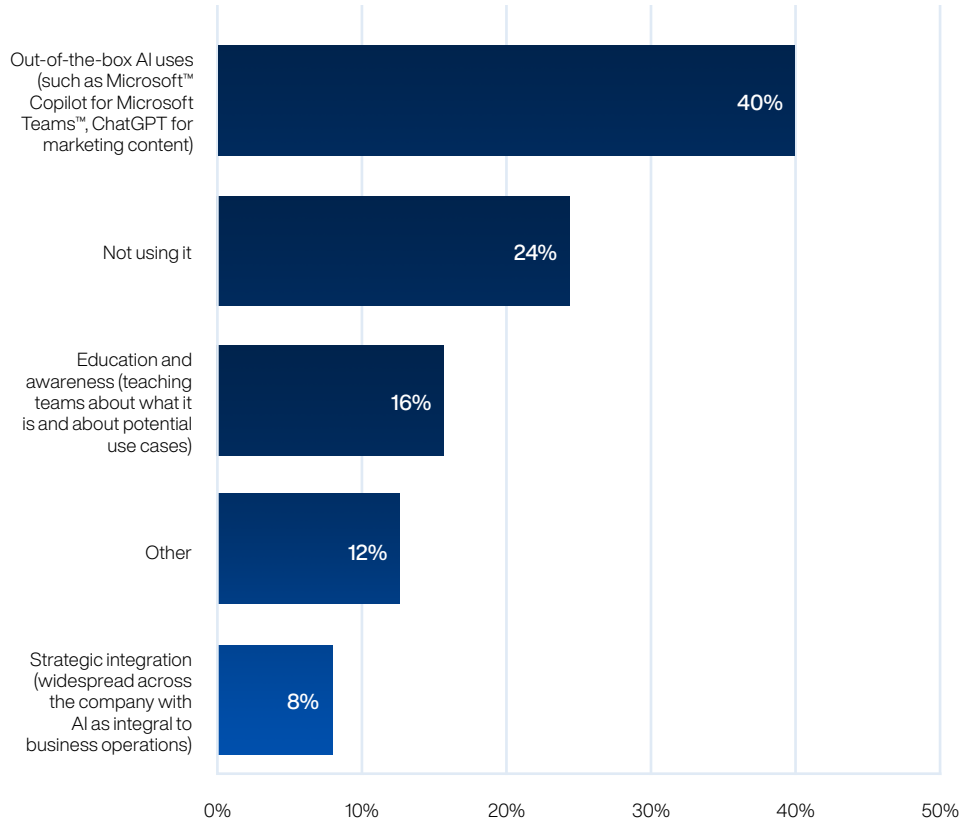


Part 3

AI

Question 9

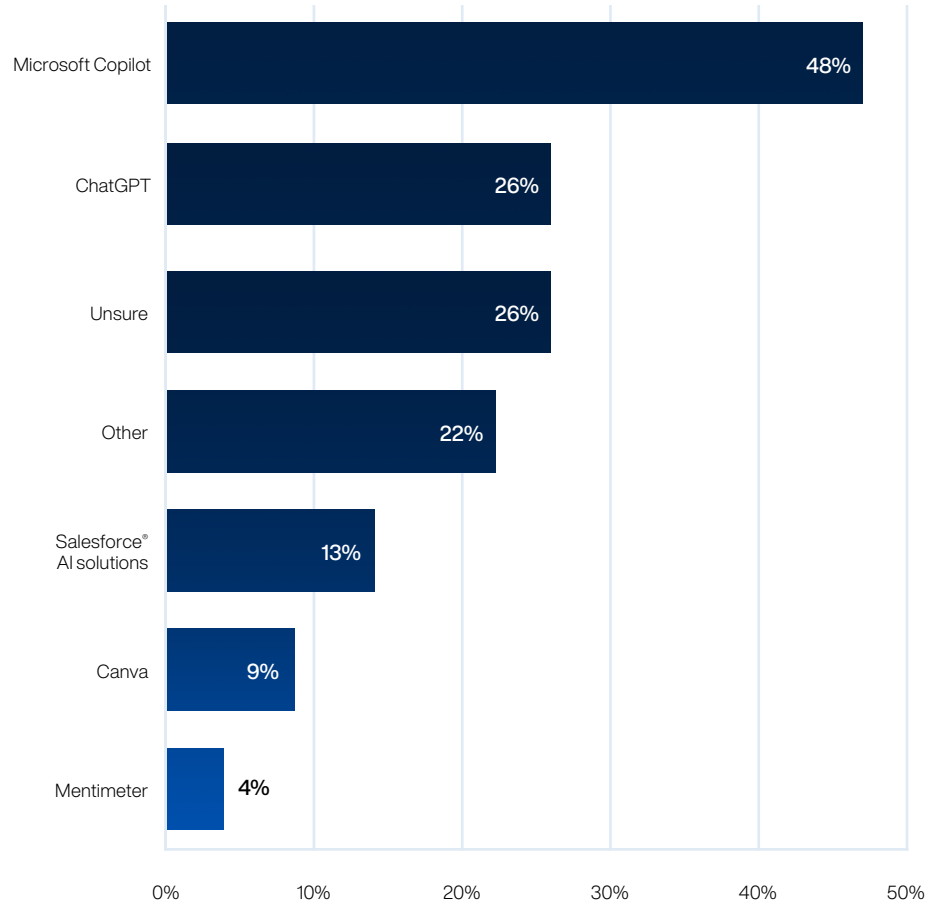
Please select the statement that best describes your company's use of AI today.



Question 10

What AI tools does your company use today?

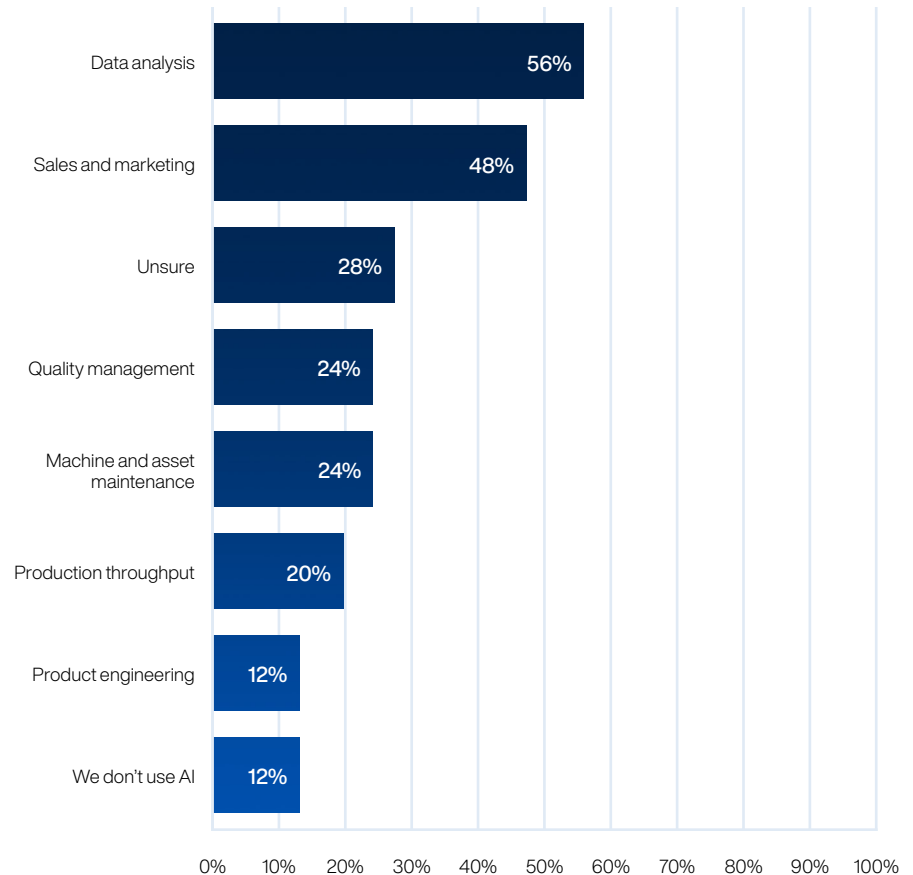
Respondents could select multiple answers.



Question 11

Where is your organization planning to use AI?

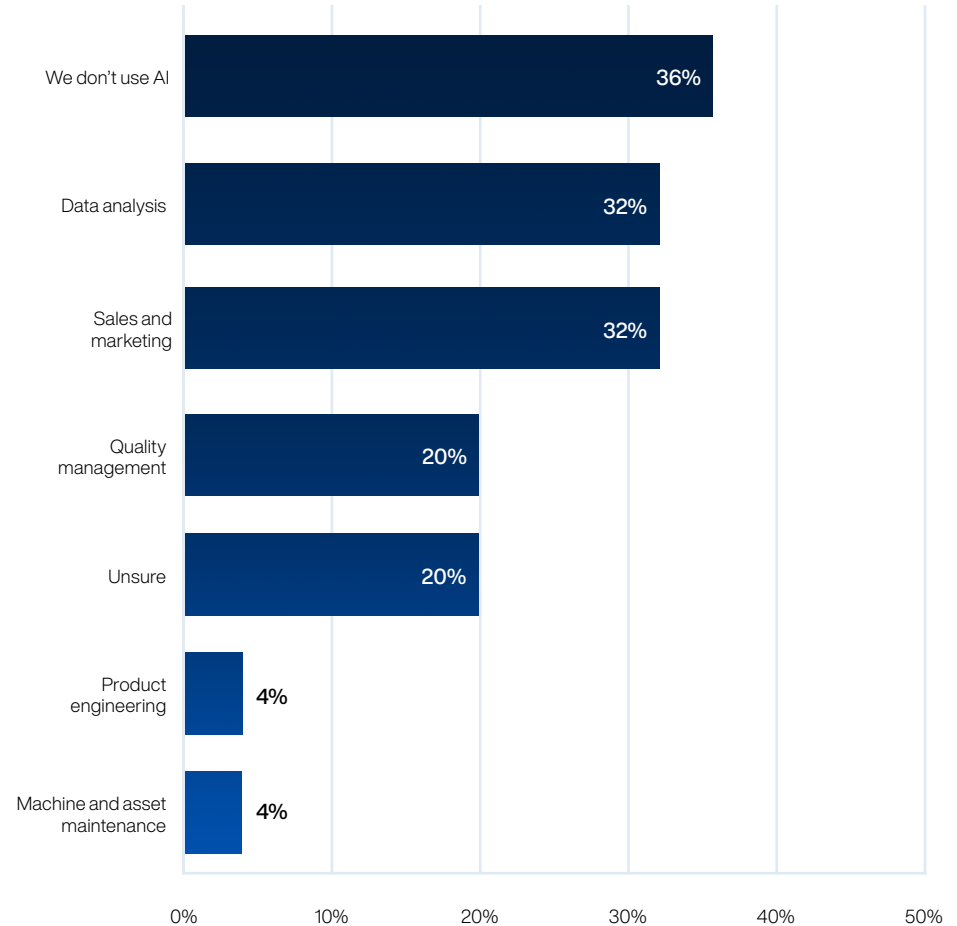
Respondents could select multiple answers.



Question 12

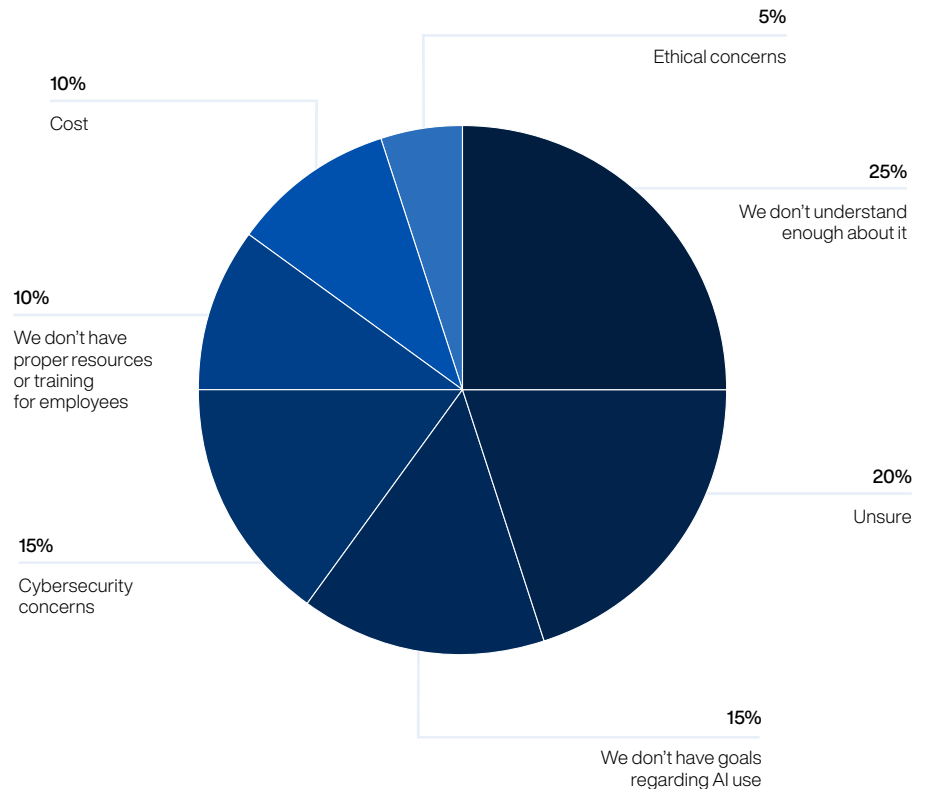
Where is your organization using AI today?

Respondents could select multiple answers.



Question 13

If you are not currently using AI, what is your number one hesitation about using it?





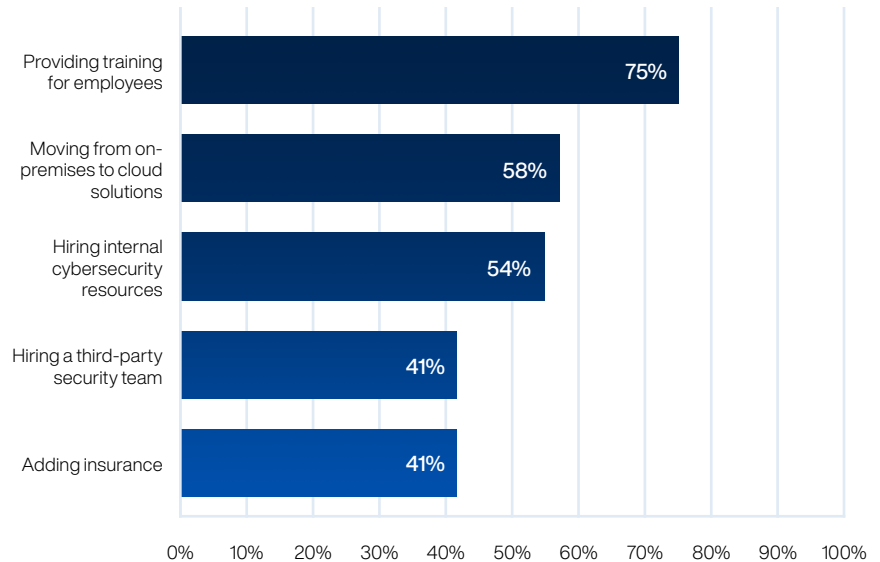
Part 4

Technology road map

Question 14

Previous survey respondents have repeatedly named cybersecurity as the most significant IT-related concern. What steps have you taken to mitigate the risk of cyberthreats?

Respondents could select multiple answers.

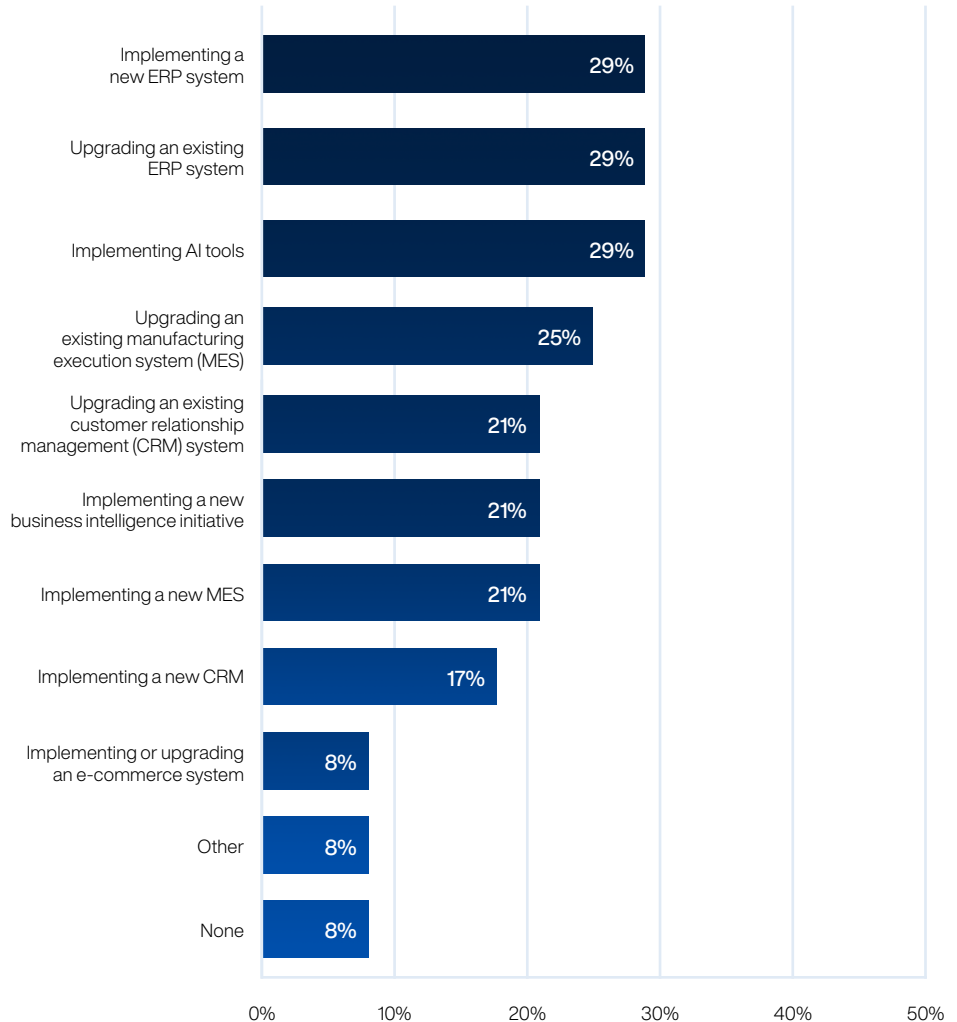


Question 15

Which of the following IT projects do you currently have in progress or plan to start in the next 12 months?

Respondents could select multiple answers.

Responses to our question about imminent IT projects over the next year demonstrate that while AI is rising as a technology priority, having up-to-date ERP systems remains critically important for metals companies, with more than half of survey participants anticipating either an implementation or an upgrade.



Question 16

What are the most common business issues or challenges your company faces?

"Transparent data for fast daily decisions"

"Employee retention for entry-level roles, cost increases and margin squeeze, knowledge management"

"Using a robust CRM to drive the business forward"

"Speed to provide estimates, order visibility, shop floor efficiency"

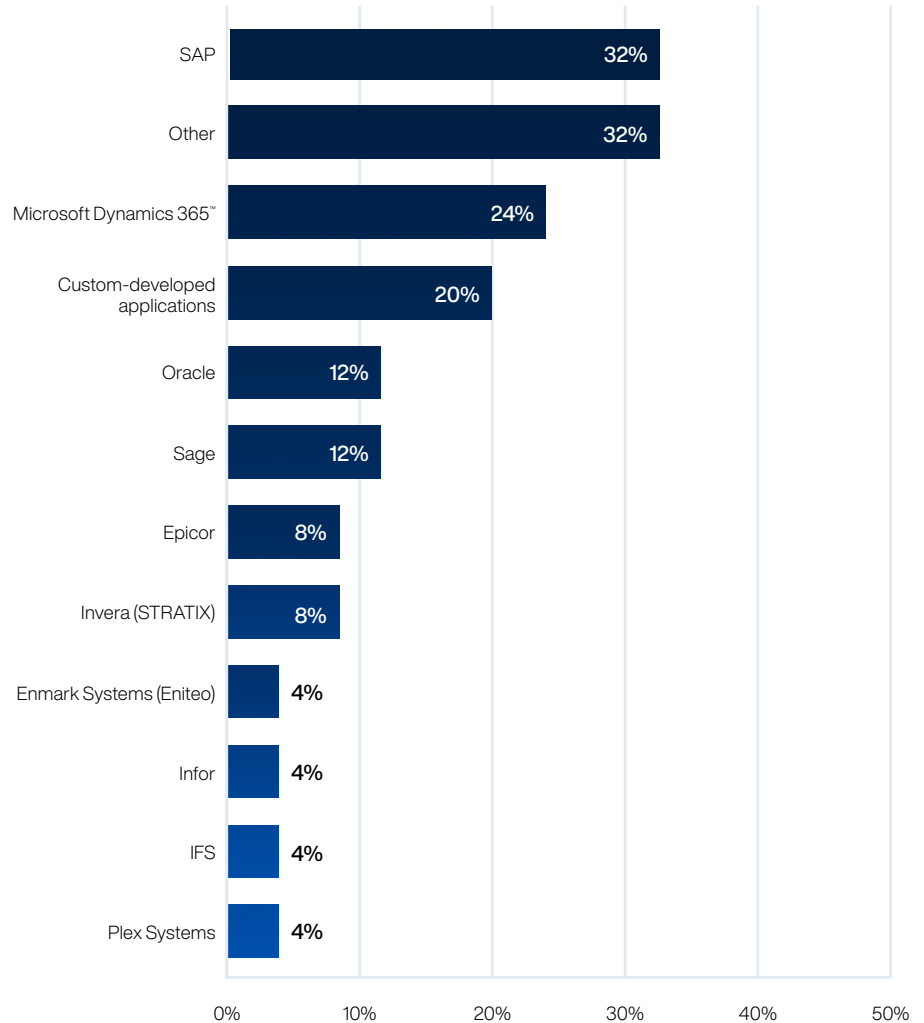
"Political uncertainty, Environmental Protection Agency uncertainty, economic uncertainty"

"Employee retention, legacy system support, nontechnical users, cybersecurity phishing"

Question 17

What ERP providers and systems are currently in use within your company?

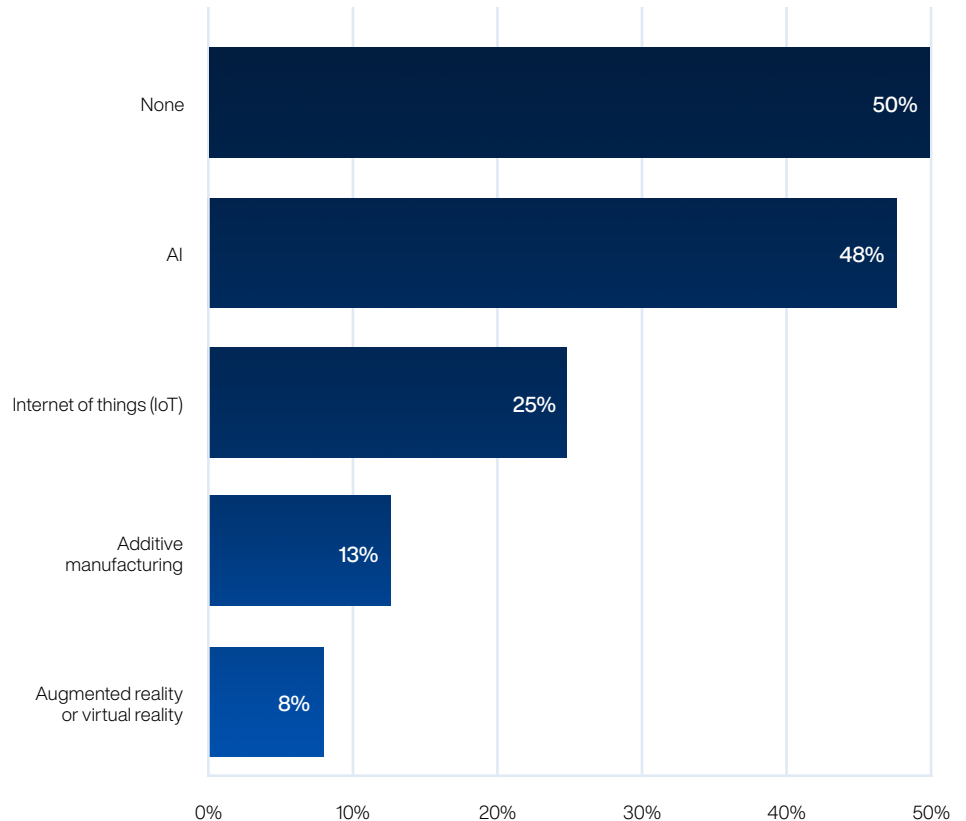
Respondents could select multiple answers.



Question 18

Which of the following technologies and approaches are currently in use at your company?

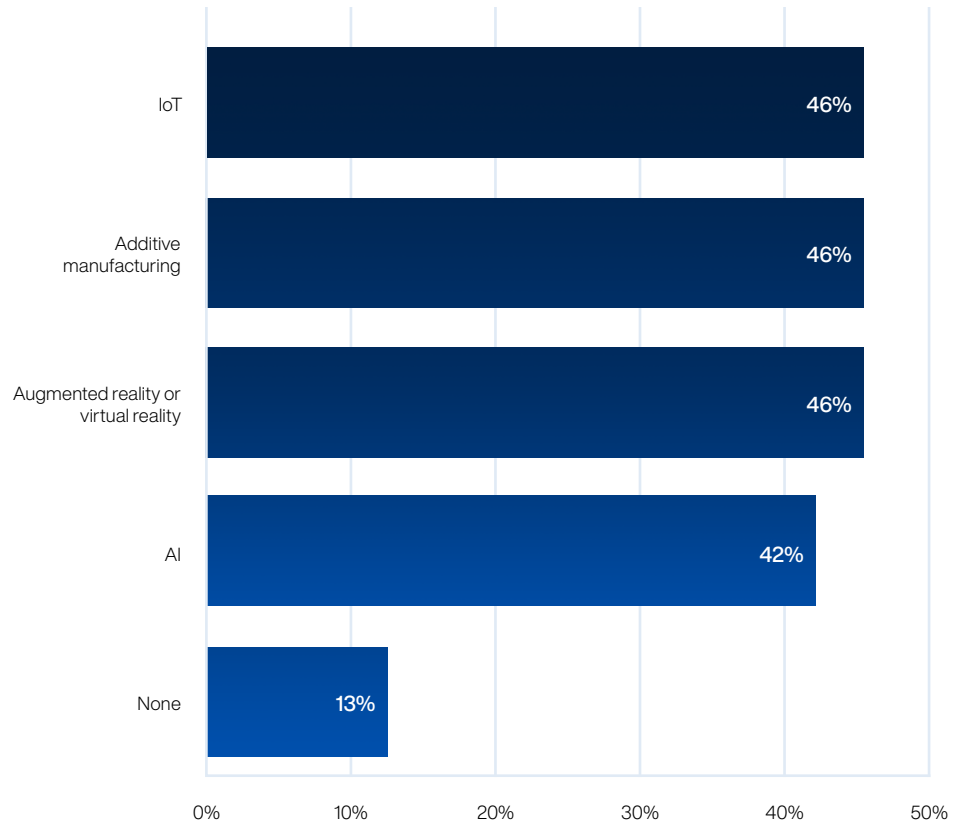
Respondents could select multiple answers.



Question 19

Which of the following technologies and approaches are currently not in use at your company that you plan to put in place within the next five years?

Respondents could select multiple answers.



About the survey

This year's online survey elicited responses from senior executives and managers across the global metals industry. Respondents represented various metals-based companies, including manufacturers, service centers, mills, scrap recyclers, producers, and processors with annual revenues from less than \$25 million to more than \$1 billion.



Have questions?

I'll be happy to provide answers for you.
Get in touch with me today.



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Note: For this survey, respondents could choose to answer or not answer individual questions. Therefore, the percentage responses from question to question might differ.

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