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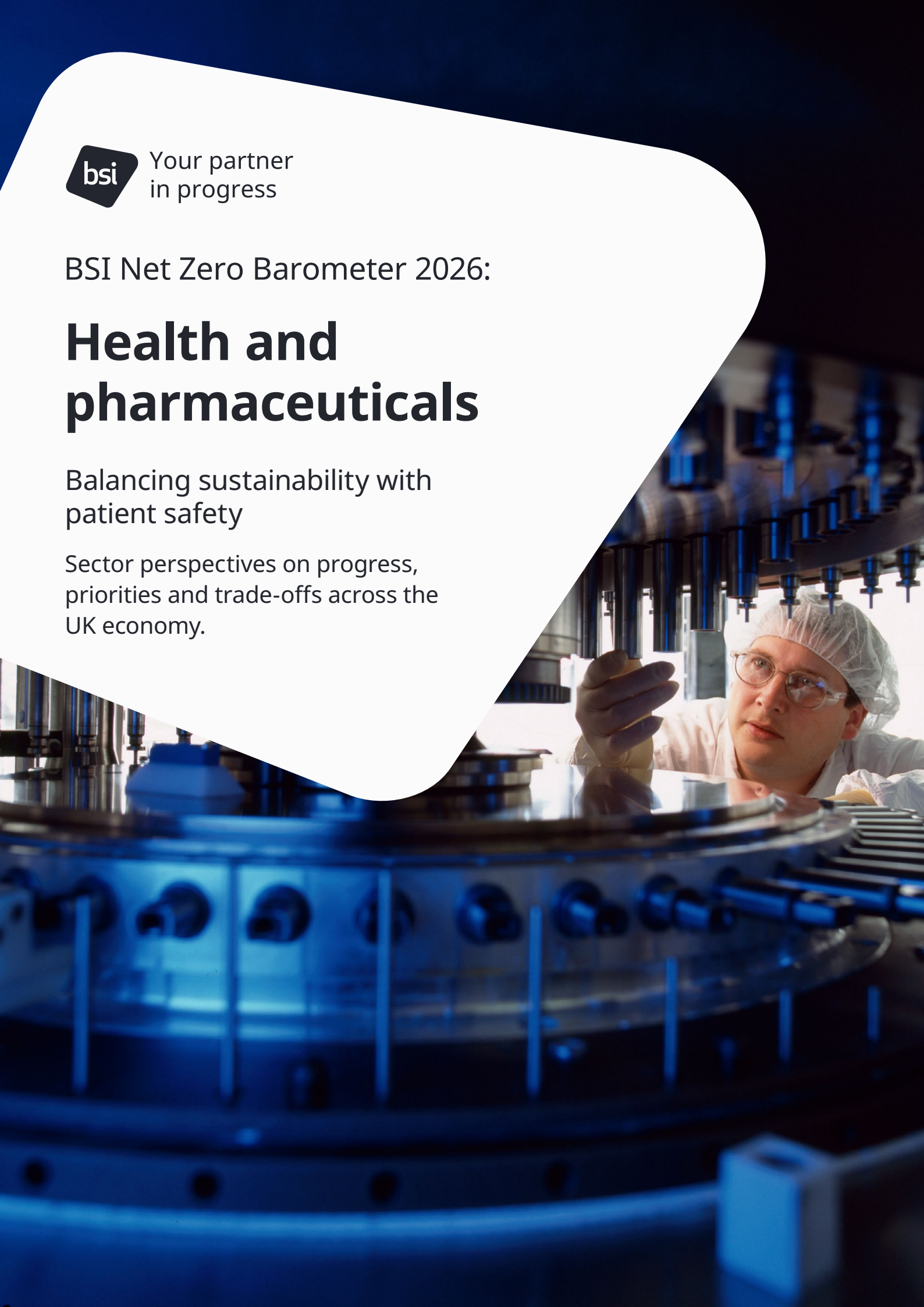
BSI Net Zero Barometer 2026:

Health and pharmaceuticals

Balancing sustainability with patient safety

Sector perspectives on progress, priorities and trade-offs across the UK economy.



Take me back to the start ›

Resolving the clinical safety-sustainability paradox, de-risking sticky supply chains, and exporting the NHS green procurement blueprint

Introduction

As BSI's Net Zero Barometer enters its sixth year of tracking UK business attitudes and progress towards net zero, one thing is clear: climate change is a health issue.

Rising temperatures spread vector-borne disease and accelerate antimicrobial resistance. This makes the case for action inseparable from the sector's core purpose of protecting health.

That urgency shows in the results. Pharma reports some of the highest commitment to achieving net zero by 2050, and the highest confidence in emissions data of any sector surveyed.

The NHS has moved net zero from bolt-on project to procurement requirement, and its supplier roadmap is now shaping standards well beyond the UK.

But commitment is not the same as progress. Patient safety comes first, so changing a supplier, a material, or a process can trigger costly regulatory re-approval.

Cost bites harder in healthcare and medical devices than in any other sector, while in pharma, almost half of businesses have recently altered, paused or dropped a target.

The result is a sector pulling in two directions at once. Exceptional commitment to net zero on the one hand, but an unresolved tension between patient safety and planetary health on the other.

The following pages look at how the sector is striking the balance as it progresses towards net zero.

Courtney Soulsby
Global Director Healthcare and Life Sciences, BSI

> "The connection between climate and health is incredibly strong, and that's what's driving the sector to really coalesce. It is rare to see this level of collaboration across stakeholder groups in many other industries

This report draws on research conducted for the 2026 BSI Net Zero Barometer, providing a sector-specific analysis of the opportunities, challenges and priorities facing UK healthcare and pharmaceuticals on the path to net zero. A full report covering and comparing in detail multiple sectors and their progress to net zero is available here.

Take me back to the start ›

Sector snapshot: Where are we now?

The climate-health nexus

Globally, the broader healthcare sector accounts for roughly 5% of global greenhouse gas emissions (more than aviation or shipping).

However driven by the climate-health nexus, the pharmaceutical sector demonstrates exceptional global collaboration on net zero. UK-headquartered giants like AstraZeneca and GSK actively lead global health task forces under the CEO-sponsored Sustainable Markets Initiative (SMI) to systematically decarbonise their clinical supply chains.

The procurement gatekeeper and NHS blueprint

Domestically, the NHS has successfully transitioned its net zero ambitions from ad-hoc or bolt-on projects into deeply embedded operational requirements. For the medical device SMEs that supply the health service, sustainability is no longer optional, but a fundamental requirement for tendering. Crucially, this influence extends far beyond the UK. NHS England's net zero supplier roadmap is actively shaping global procurement scope and standards. As the secretariat for the World Health Organization's (WHO) Alliance for Transformative Action on Climate and Health (ATACH), NHS England is actively driving green procurement standards forward. Through this leadership role, its own net zero supplier roadmap is being used as the foundation to establish a blueprint for global health systems.

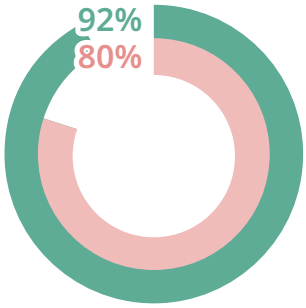
Take me back to the start ›

A Note on Methodology: This year's Net Zero Barometer survey evaluated Healthcare / Medical Devices and Pharmaceutical cohorts as distinct data sets. Consequently, their quantitative findings are presented separately below.

The data picture: Pharmaceuticals

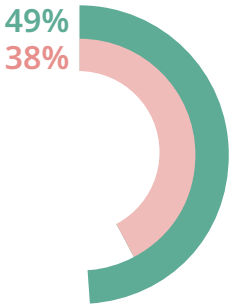
Pharmaceutical businesses surveyed

Average across all sectors surveyed



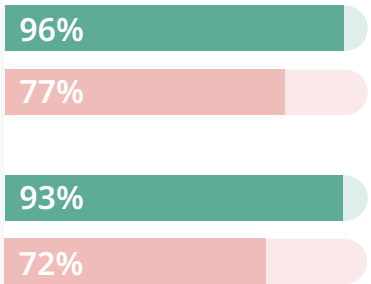
A heightened sense of risk

92% of pharma firms are concerned about future costs and resilience if they fail to prepare adequately for climate change. Much higher than the **80%** across all sectors surveyed. This fear is grounded in immediate operational threats. For example, pharmaceutical manufacturing is heavily reliant on high-quality water. Facilities in drought-stricken areas of Europe (such as Spain) have faced ultimatums to cut water usage.



Highly committed but volatile

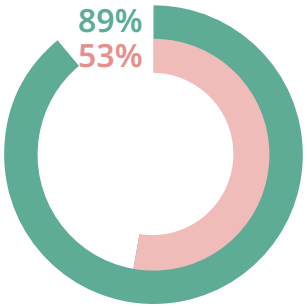
While pharma firms are amongst the most committed to achieving net zero by 2050 (**98%** fairly or very committed), **49%** have recently altered, paused, or dropped their targets. This compares to the overall proportion of **38%** across all sectors in the survey, indicating a high degree of strategic re-calibration.



Data confidence

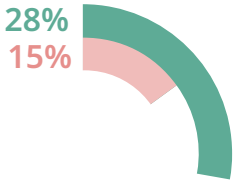
The sector displays the highest levels of confidence in its own emissions data (**96%** vs. **77%** total). Reporting from its complex supply chains shows a similar trend (**93%** vs. **72%**).

Take me back to the start ›



The communications pivot

The sector is highly risk-averse – **89%** of pharma firms have changed how they communicate climate action due to rising climate scepticism. This is the highest of any sector surveyed, and well above the total proportion of **53%**.



Staff pressure as a catalyst

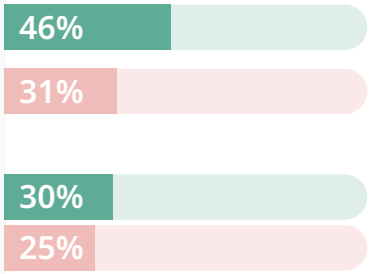
Internal expectations are a relatively strong driver for action – **28%** of firms cite staff pressure as a key reason for action. This comfortably exceeds the total level across all sectors of **15%**. This reflects a workforce that acutely understands how environmental degradation and rising global temperatures directly compromise public health.

Take me back to the start ›

The data picture: Healthcare and medical devices

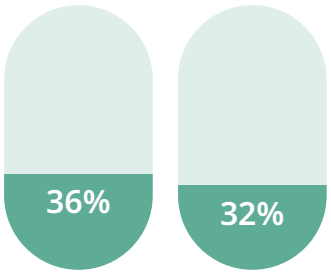
Healthcare and medical device businesses

Average across all sectors surveyed



The cost barrier

In the face of growing pressure to decarbonize healthcare supply chains, healthcare & medical device firms face particularly acute financial constraints. Cost is by far the primary barrier to action for **46%** of the sector, which is notably higher than the level of **31%** across all sectors surveyed. This is compounded by a lack of available financing to invest in technology, cited by **30%** of the sector – **5%** above the average.



Procurement and efficiency drivers

Cost savings and operational efficiencies were the most commonly cited drivers for pursuing net zero action (selected by **36%** of firms surveyed). Furthermore, the wider transition is heavily shaped by immediate financial realities. **32%** of firms are actively adjusting their plans in response to economic factors like the price of energy and the cost of doing business.

> "Because the healthcare system is so vast and unwieldy, trying to solve everything at once is impossible. The breakthrough won't come from trying to boil the ocean. It will come from targeting three or four high-impact, specific areas – like single-use plastics – where we can standardize circular approaches without compromising care.
>
> **Rob Turpin**
> Head of Healthcare Sector, BSI

Take me back to the start ›

Key barriers & pressures

- **Patient outcome vs. planetary health:** The healthcare system is structurally designed to prioritize individual patient outcomes. Identifying where to draw the line between a life-saving medical intervention and its broader environmental harm remains a yet-to-be resolved ethical and operational dilemma.
- **The regulatory framework:** Getting a product to market can be a very expensive process. Reducing the emissions associated with an existing product is also fraught with risk. For example, in pharma, changing a manufacturing process, substituting a material, or switching packaging requires new regulatory approvals that could threaten a company's market authorization licence.
- **Scope 3 stickiness:** While other sectors can mandate that their suppliers decarbonize or lose their contracts, pharma lacks this lever. Suppliers are explicitly named on regulatory approval licenses, making them difficult to substitute. So, reducing Scope 3 emissions can be a more complex and lengthier process in pharma versus other sectors.
- **Waste avoidance over true circularity:** Nearly 48% of all medical devices used in the UK are single-use. Transitioning these to reusable formats requires bolting on intensive, costly, and potentially chemically harmful decontamination and sterilization processes. Consequently, rather than true circularity, the industry is focusing on establishing take-back schemes, representing a pragmatic shift toward waste avoidance.
- **Regulatory blind spots:** Regulations focus rigidly on clinical safety and performance. Currently, there is little integration of sustainability metrics within international safety compliance, making innovation difficult to audit or enforce globally.

> "Getting a product to market is a very costly exercise. The uniqueness of the pharma and medical device sectors is that suppliers are named directly on the regulatory approval process, making them incredibly sticky. You can't simply substitute suppliers because they aren't decarbonizing easily, as reapproval for changes to your process or materials is really difficult and threatens your market authorization license.
>
> **Courtney Soulsby**
> Director of Healthcare and Life Sciences, BSI

Take me back to the start ›

Drivers and opportunities for progress

- **Procurement power:** The absolute driver for action in the UK is NHS tendering, where manufacturers will innovate specifically to ensure they meet sustainability criteria. In Europe, healthcare systems and license holders are also now actively enforcing environmental criteria, with net zero requirements sometimes weighted as heavily as 30% in tenders.

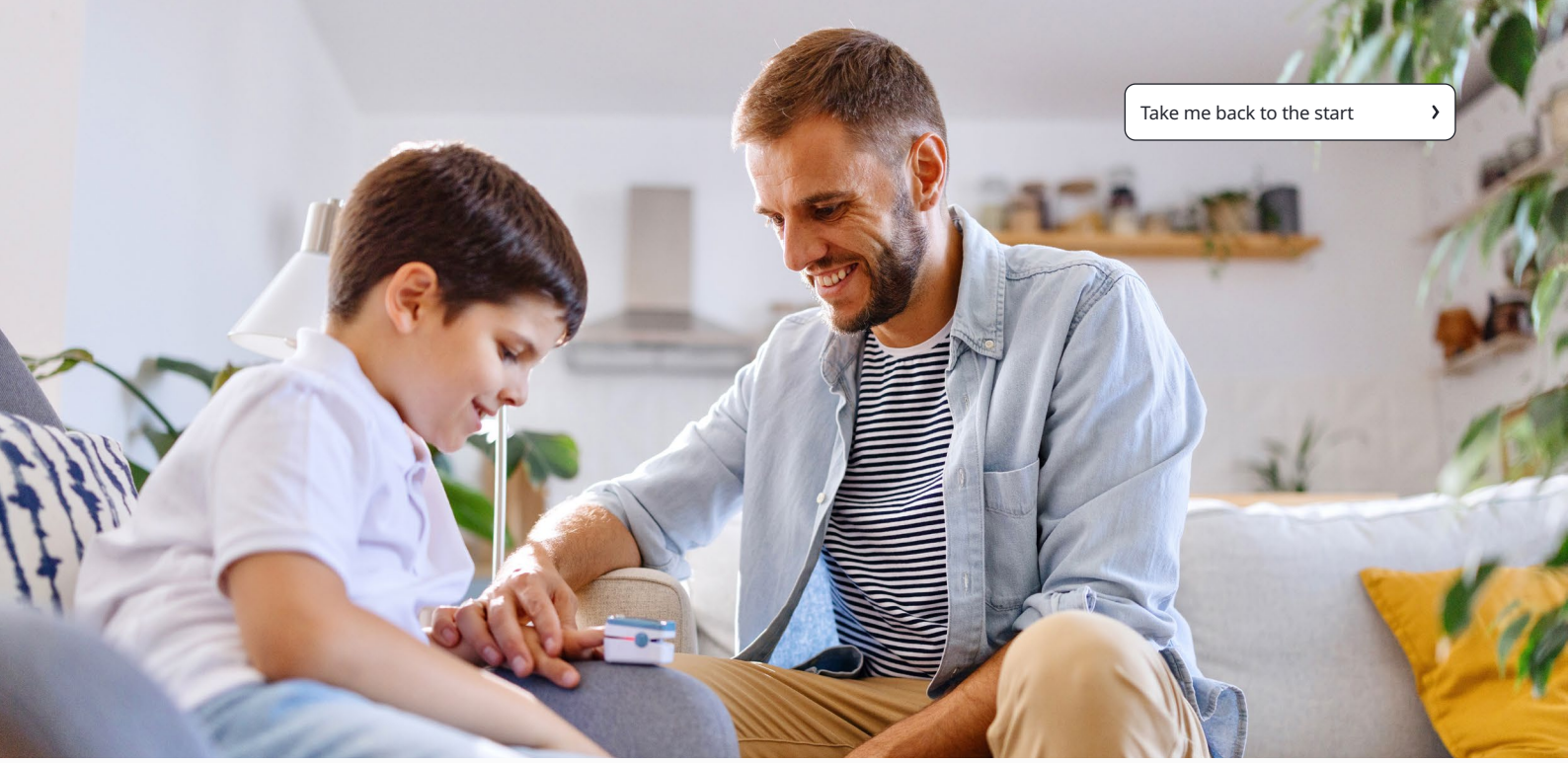
- **Targeted circularity:** A big opportunity lies in targeted strategies tailored to specific product types. These could range from high-volume, lower-risk items for remanufacturing or recycling (e.g., surgical gowns) to complex equipment like CT scanners. The NHS will need to determine where the greatest environmental and operational impacts lie.

- **Exporting the NHS blueprint:** The UK is actively leading the way in global healthcare decarbonization. NHS England's net zero supplier roadmap is shaping global procurement standards through the World Health Organization's ATACH programme. This means domestic progress to meet these green criteria presents a massive opportunity. There is a chance to establish the blueprint for how international health systems will reduce their environmental footprints.

- **Emissions at a product level:** Increasingly, we're seeing a shift away from broad organizational emissions reporting and towards product-level carbon footprint data. Standards like PAS 2090 help to calculate the emissions as well as other environmental impacts of individual products across their lifecycle.

- **Capitalizing on technological advancements:** A focus on innovation is a major opportunity to overcome strict manufacturing constraints. Interestingly, 57% of pharma firms cite new technological advancements as a primary driver for updating and evolving their net zero transition plans.

- **The investor community:** Unlike many other sectors, the transition in pharma is being heavily driven by the investor community, with sustainability and environmental engagement now prominent in quarterly investor reports. This plays a major role in maintaining momentum.



Take me back to the start ›

Looking ahead: The next 12-24 months

The immediate future of the sector will be shaped by the challenge of navigating complex global markets alongside localized sustainability mandates. For pharmaceuticals, the US remains by far the most lucrative global market. However, it's one that's highly decentralized and currently seeing significant political pushback against sustainability and ESG criteria. There will need to be a careful balance between this commercial reality and the strict, sustainability-incentivized procurement rules of Europe and the NHS.

Medical device developers face a slightly different dynamic. While heavily influenced by the NHS domestically, some 95% of medical device companies sell internationally. The looming risk is that if UK procurement requirements become too burdensome compared to other global markets, these international suppliers may simply choose to bypass the UK entirely.

Ultimately, the challenge across healthcare and pharma is that they operate in a highly global and uneven marketplace. To maintain momentum without compromising product availability, the long-term goal needs to be global harmonization. By shifting sustainability from a localized procurement hurdle into a universal regulatory standard, the industry can overcome fragmented national policies and establish low-carbon guidelines shared by all.

> "When you sit in the room with the Department of Health, the NHS, and industry bodies, you realize everyone shares the exact same goal. It doesn't feel biased toward one side or the other. There's a genuine, healthy collaboration across the entire ecosystem because everyone recognizes that protecting the planet is ultimately about protecting human health.
>
> **Rob Turpin**
> Head of Healthcare Sector, BSI

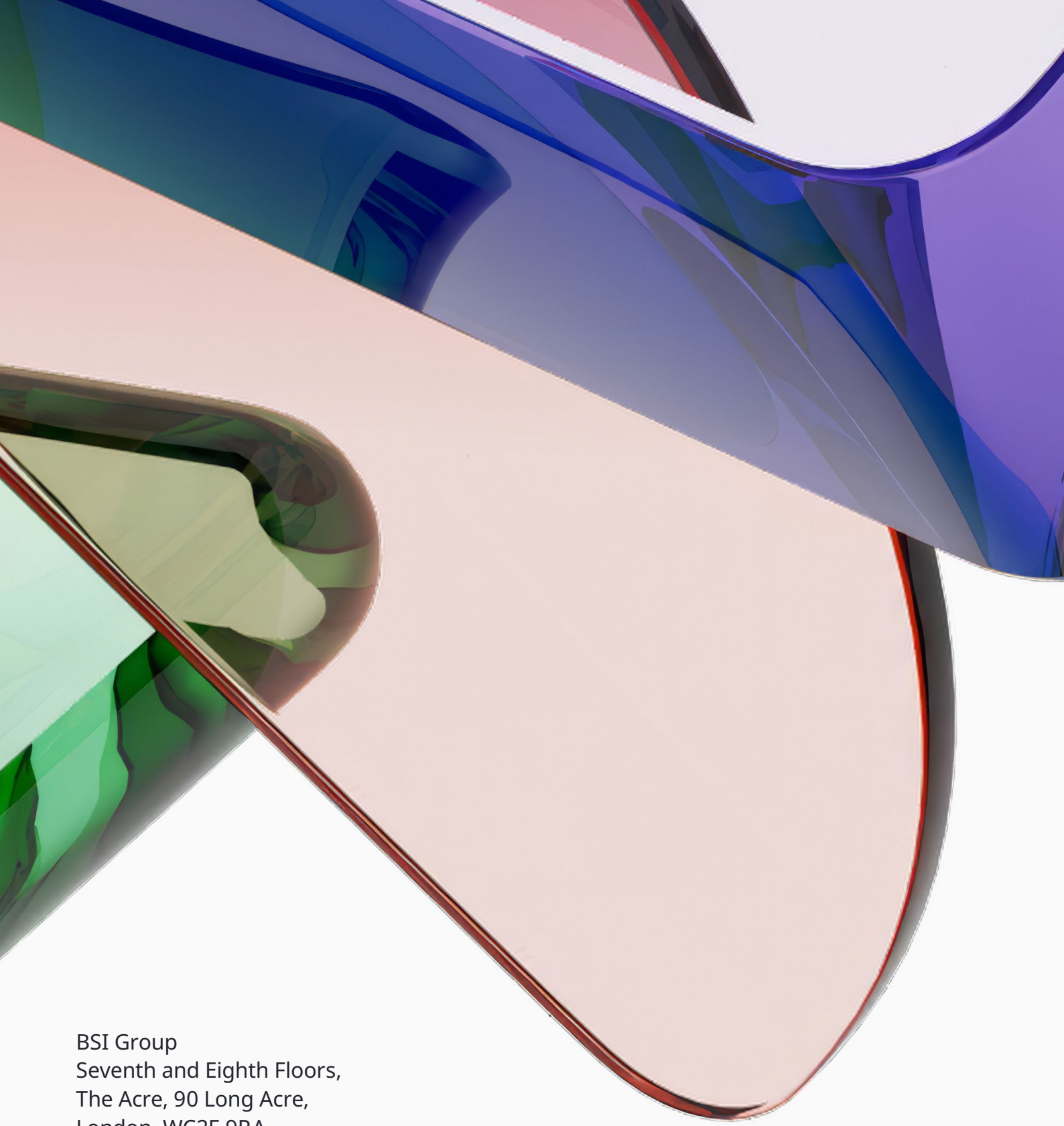
Take me back to the start ›

Key standards for net zero in the healthcare and pharmaceutical sector

Search by standard title on BSI Knowledge for more details.

Stay up to date with the latest developments in healthcare standards here.

Standard	What it does
PAS 2090:2025 – Pharmaceutical products. Product category rules for life cycle assessments. Specification	Sets out requirements for the product category rules (PCR) to be applied when carrying out an environmental lifecycle assessment (LCA) for pharmaceutical products and for reporting environmental LCA results. It creates a shared technical language across the industry and provides a clear methodology. It's flexible enough to allow organizations at different levels of data maturity to comply without disproportionate burden. It also reduces duplication by harmonising methods across the sector. It establishes clear rules for documenting assumptions, boundaries, and data sources – helping to build trust with partners. Read more about the standard here.
BS EN ISO 14067:2018 – Greenhouse gases. Carbon footprint of products. Requirements and guidelines for quantification	Specifies principles, requirements and guidance for quantifying and reporting the carbon footprint of products across their life cycle. From raw material extraction through production, use and end-of-life. It provides a consistent, science-based methodology for assessing greenhouse gas emissions and removals associated with products and services. This helps organizations produce credible, transparent and comparable carbon footprint information. It establishes clear rules for defining system boundaries, collecting and assessing data, addressing emissions and removals, and reporting results. It also supports partial carbon footprint assessments, helping organizations identify emissions hotspots, track reductions and evaluate alternative materials, designs, production methods and end-of-life options. Read more about the standard here.
BS EN ISO 14064-1:2019 – Greenhouse gases. Specification with guidance at the organization level for quantification and reporting of greenhouse gas emissions and removals	Sets out principles and requirements for quantifying and reporting an organization's greenhouse gas (GHG) emissions and removals, including how to design, develop, manage and verify a GHG inventory It provides a consistent framework for establishing organizational and reporting boundaries, identifying emission sources and sinks, calculating emissions and removals, and managing the quality of GHG data. It establishes clear requirements for documenting and reporting GHG information, while supporting the identification of emission reduction and removal opportunities, setting targets and tracking progress over time. Read more about the standard here.



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