

Sustainability research key take aways at Pharmapack 2025

Pharmapack Customer Insights Survey results

Number of respondents: 161

51%

Visitors

45%

Exhibitors

The value of implementing sustainability strategies for an organisation



57%

say that it gives a competitive advantage



45%

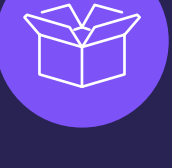
say it enhances reputation and stakeholder trust



7%

say there is limited or no tangible value

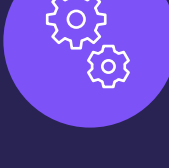
What kind of organisation?



24%

Packaging

(supplier/manufacturer)



12%

Machinery and equipment

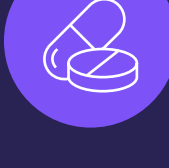
(supplier/manufacturer)



10%

Drug delivery

(supplier/manufacturer)



10%

Pharmaceutical company



30% have **fully integrated sustainability** into their mission or strategy.



70% state that **sustainability is important to their roles** (top were sales and business development, and packaging development).



Impact of regulations – 45% say that **sustainability focused regulation** impact their company by driving innovation and opportunity.



Supply chain – 38% indicate that their organization **interacts with its supply chain around sustainability** by collaborating on sustainability initiatives.

Main barriers to increasing sustainability efforts within an organisation



76%

say **resource constraints** (time, money, staff) (n: 123)



73%

say **lack of standardised formats for data sharing** (n: 118)



70%

say **insufficient regulatory guidance** (n:113)

Main challenges of sustainability regulations



43% Understanding the scope of regulations



36% Managing data collection across the supply chain



29% High costs of compliance

Sustainability at Pharmapack

63%

are satisfied with the sustainability efforts demonstrated at Pharmapack by the organisers



Top features for knowledge building

76%

Case studies and best practices for implementing sustainability initiatives

74%

Updates on **regulatory changes and compliance requirements**

68%

Tools, templates, and KPIs for tracking and improving sustainability performance

Participation of respondents in sustainability related activities at Pharmapack 2025

Visited the Sustainability Centre (n:96) **60%**

Joined the Sustainability Collective (n:34) **21%**

Attended our sustainability content track (n:34) **16%**

Engaged with the Better Stands programme (n:34) **11%**

Joined the sustainability networking breakfast (n:34) **11%**

Top 3 mentioned sustainability content topics

Regulations and compliance

3

Packaging and materials

1

Recycling and waste reduction

2



Sustainability Collective roundtable meeting at Pharmapack 2025



1

Regulation

How is it changing the sustainability conversation in pharma?

- Seen as a **driver of innovation** and competitive edge
- **Encourages collaboration** across the value chain
- **Needs to apply to all players** – large and small
- **Transparency requirements** push greater investment in sustainability
- **Penalties** for non-compliance seen as most effective
- Reporting burden is high
> **Need for smarter systems & tech**



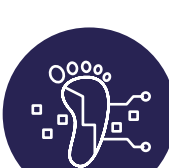
2

Data

How are organisations approaching the challenges around collecting and utilising high quality sustainability data to drive transformation?

- Needed to build **strong business cases**
- Data demand is **fragmented across frameworks**
> needs simplification
- **Lack of access to high-quality data** across the supply chain
- Critical to inform **investment, decision-making,** and use of LCAs

Collecting Smarter: Preparing for 2025 data demands



Data Collection & Management

Most organisations are tracking:

- Carbon footprint
- Use of recyclable materials
- Sustainability questionnaires

Focus is shifting toward:

- Decarbonising raw materials
- Reducing energy usage

Key challenges:

- Complex Life Cycle Assessments (LCAs)
- Data gaps from small suppliers



Looking ahead: 2025 Data Requirements

New demands driven by:

- CSRD
- Regulatory pressure
- Customer expectations

Some companies remain unaware of upcoming data needs

Highlighted challenges



Data collection



Accurate carbon data



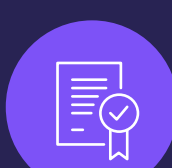
Data sharing consistency



Trust and validation



Scope 3 calculations



Lack of specifications



Lack of automation



Lack of secure data sharing platforms

“ The biggest challenge is that pharmaceutical organisations are not built to generate and share that kind of data. The industry needs to know that physical information, but we don't know how to provide it effectively. ”

Sustainability Collective member

Regulation main takeaways

1

Impact of regulations

Packaging and waste regulations are significant, with a requirement of 100% recyclable packaging for 2030.

2

Opportunities from Regulations

Opportunities in developing sustainable packaging solutions, reducing carbon footprint, and innovating with biobased polymers and other sustainable materials.

3

Industry Preparedness

The industry is generally conservative and not fully prepared for upcoming regulations.

4

Compliance Challenges

Challenges include resource allocation, innovation, and regulatory clarity. Clear, structured, and accessible guidance is needed.

The Sustainability Collective is working closely with the Strategic Insights & Research team across CPHI and Pharmapack events to find out the most crucial issues we are facing in sustainability in the pharmaceutical industry at the minute, and where best for the Sustainability Collective to start to aid the industry in progressing in this journey.