Pharma's Green Frontier

iNIZIO evoke

Making a statement in sustainability



Health more Human™: whitepaper, June 2025

Foreword:

The Inizio perspective



Dervala Leahy,
Head of Sustainability, Inizio

> ***Sustainability is no longer a peripheral issue for pharma. It's an imperative that defines reputation, trust, and long-term relevance.***

We're entering an era where healthcare professionals, patients, and consumers expect the industry to be as responsible about the planet as it is about patient outcomes. The sector is being called - loudly and clearly - to lead, and it's already rising to the challenge with purpose and progress.

That's why Inizio Evoke commissioned this report. Our aim is to help the healthcare industry build on the great progress that's being made to ensure that sustainability communications are not just credible, but also compelling. Because when it comes to the health of humans and our planet, words matter. But action matters more.



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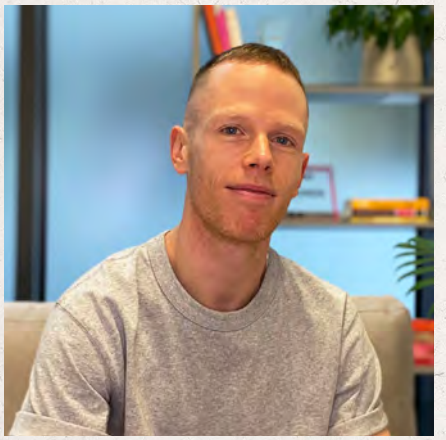


Research

Our methodology

Introduction

Why now?



Joe Marshall,
Strategy Director,
Inizio Evoke

> ***We can no longer turn a blind eye to healthcare's climate impact. If the healthcare sector were a country, it would be the fifth largest emitter of greenhouse gases globally. This puts our industry, one founded on the principle of 'do no harm', at a crossroads.***

According to the World Health Organization, climate change is already **the single greatest threat to human health**. It exacerbates chronic conditions, widens health inequalities, and stretches healthcare systems to breaking point. The urgency is clear: our sector has a vital role to play in aligning with the Paris Agreement and accelerating progress toward net zero by 2050.

The good news? Momentum is building. **Healthcare professionals (HCPs)** across the globe are **voicing rising concern** about the environmental impact of the products and devices they prescribe.

Our latest research reveals that **85% of HCPs** believe pharmaceutical companies should communicate the environmental impact of their products.

This whitepaper shares those voices. It explores what HCPs see, want, and need when it comes to sustainability communication and provides clear, practical recommendations for how the industry can respond. Because while the healthcare sector is already taking steps in the right direction, **now is the time to build trust**, **accelerate action**, and **lead with credibility**.

Together, we can shape a future where **healthcare heals** not just people, but the planet too.



sermo | Research Partner

Research methodology

To inform this paper, Inizio Evoke conducted what we believe to be one of the most comprehensive reviews of healthcare professionals' views on sustainability ever undertaken.

Our rapid insight survey gathered responses from **over 950 HCPs** across **15 therapy areas** and **six global markets.** We explored their awareness, concerns, and expectations around the environmental impact of pharmaceutical products and medical devices.

To complement these findings, we also conducted a global review of published literature on pharma and the environment. Together, this research provides vital context for understanding the communication gaps and the growing opportunities to close them with credible and consistent sustainability storytelling.

6 Markets

15 Therapy areas

950 HCPS



Health impact



An inseparable link

Why this research is important

Climate change isn't a distant threat, it's already putting lives at risk, especially for those with chronic health conditions.

Rising temperatures and extreme weather events are worsening heart disease, respiratory illnesses, and diabetes, turning climate into a direct and deadly health hazard.

The evidence is clear and the urgency is real: acting on climate change is not just environmental stewardship, it's critical, life-saving healthcare.

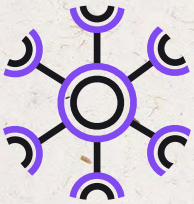
Extreme temperature is just the tip of the iceberg. The World Health Organization outlines many ways climate change is impacting our health[2].



Heatwaves intensified by climate change, are triggering spikes in cardiovascular disease and stroke, placing vulnerable populations at serious and immediate risk



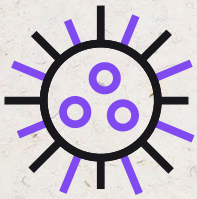
Floods lead to food insecurity and malnutrition. They displace communities, contaminate water supplies, and severely disrupt access to essential health services when they are needed most



Air pollution is a silent killer, driving up rates of heart disease, stroke, asthma, chronic obstructive pulmonary disease (COPD), and lung cancer. Its effects are pervasive, long-term, and deeply damaging to public health



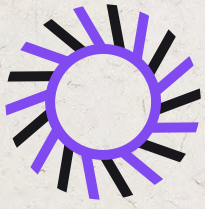
Wildfires are no longer rare events, they are escalating in frequency and severity and have been linked to a surge in cardiovascular and respiratory problems. They are also linked to suffocation, burns, and serious mental health impacts



Vector-borne diseases like malaria, dengue, Lyme disease and Zika are expanding into new regions. This is because warmer temperatures and changing rainfall patterns create more hospitable environments for mosquitoes and ticks



Climate-related displacement increases risks of overcrowding, poor sanitation, and limited healthcare access, often exacerbating existing inequalities and exposing communities to new disease environments and instability



Droughts fuel a cascade of health crises, causing food insecurity, malnutrition, and rising levels of psychosocial stress, particularly in already vulnerable communities



Executive summary

Data with a pulse

HCP perspectives on pharma and the planet

To drive credible, industry-wide change, we must understand how healthcare professionals perceive and respond to sustainability claims.

To accelerate action, we need to know where awareness is growing, where barriers persist, and what support HCPs need to make environmentally informed decisions.

This executive summary presents key findings from our pan-region survey on this subject. It also offers timely insights into how the healthcare sector can better align its sustainability communications with the expectations of those on the front line of care.



Sustainability matters

94% of HCPs say:
environmental sustainability will influence their treatment decisions by 2030.

85% of HCPs believe:
pharma companies should be transparent about the environmental impact of their products.

81% would choose:
the more sustainable option if two products had equal safety and efficacy.

Their top concern:
Plastic waste emerged as the top environmental concern across all regions and specialties. It ranked highest for its visibility and daily clinical impact.



Specialties and sustainability

Some specialties are clearly ahead of the curve:

Pulmonologists lead, with 42% expressing deep concern about environmental impacts. A likely reflection of the direct link between air quality and respiratory health.

General Surgeons and Oncologists are already factoring sustainability into clinical decisions. Over half are expecting it to strongly influence choices by 2030.

Nurses are also taking action, integrating environmental awareness into daily practice.

Barriers to change

Cost, clarity, and choice

Transparency isn't just a nice-to-have in sustainability communications, it's the foundation of trust. HCPs are asking for clarity on the environmental impact of the products they prescribe. When environmental information is unclear, inconsistent, or buried in technical jargon, it becomes difficult for HCPs to act on, even if they want to.

Our data shows that lack of trusted information is one of the top barriers preventing sustainable decision-making in clinical settings.

This is particularly true in the UK, where 65% of HCPs said they struggle to access reliable environmental claims.

Without clear, substantiated data, companies risk being dismissed, or worse, accused of greenwashing. In a landscape increasingly shaped by legislation and public scrutiny, the reputational risks are real. But some organisations are already raising the bar.

Chiesi is the world's first B-Corp pharma company. They are working hard to transition to CFC-free inhalers, demonstrating a clear commitment to both environmental action and audience understanding.

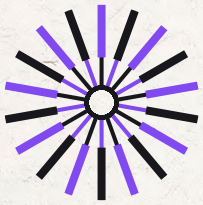
And in 2024, the Novo Nordisk Foundation hosted the world's first Global Science Summit on Climate and Health, bringing together over 150 global leaders in science, policy, and philanthropy. The landmark event spotlighted the urgent intersection of climate change and health, particularly the rising burden of chronic and infectious diseases, and aimed to drive cross-disciplinary collaboration and innovation for a more sustainable, healthier future.

> ***As medical professionals, our commitment is to first do no harm. Places of healing should be leading the way, not contributing to the disease.[1]***
>
> ***Health Without Harm Report***

While healthcare professionals are increasingly aware of the environmental impact of the products they use, turning that concern into consistent, meaningful action is far from straightforward.

Our research reveals that even the most motivated HCPs face significant systemic obstacles, barriers that must be addressed if sustainability is to become a practical part of everyday clinical decision-making.

Three key barriers emerged:



Cost
The most cited obstacle globally, particularly among GPs, pharmacists, and vets



Limited availability
Sustainable alternatives are simply not accessible enough, reinforcing inertia



Lack of information
Especially in the UK, where 65% of HCPs struggle to access clear, trusted environmental data



The opportunity ahead

Our findings reveal a profession that is ready for change, but, in some cases, still lacks the tools, transparency, and confidence to act.

The future of healthcare is one where environmental and human health are inseparable, and it's encouraging to see HCPs are looking to industry leaders to help them bridge the gap.

The call to action is clear: communicate with credibility and with clarity for lasting impact.



Key findings and takeaways

Headline research takeaways



Growing Concern

Global

75% of HCPs are somewhat or very concerned about the environmental impact of products they use.

Regional

36% of HCPs in France are notably more worried.

By specialty

42% of pulmonologists are very concerned about the environmental impact of drugs and products in their field, making them the most concerned specialty.

64% of GPs are somewhat concerned.



Environmental Impact

Global

Around **85% of HCPs** strongly agree that **pharmaceutical** and **MedTech** companies should call out the environmental impact of their products.

Regional

49% of HCPs believe pharmaceutical companies should actively communicate the environmental impact.

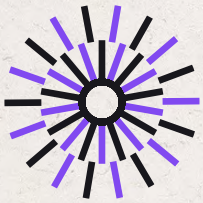
51% of HCPs believe MedTech companies should actively communicate the environmental impact.

By specialty

Pharma: 52% of general surgeons and 50% of OBGYNs are most likely to strongly agree that pharmaceutical companies should disclose the environmental impact of their drugs.

MedTech: 47% of general surgeons and OBGYNs and 48% of intensive/critical care workers show the highest levels of agreement regarding the need for environmental transparency from MedTech companies.

Headline research takeaways



Influence on decision making

Global

81% of HCPs would likely choose the more sustainable option if two devices or drugs had equal safety or efficacy data.

38% of HCPs agree that environmental sustainability claims influence their drug or product decision making. **This is expected to grow in importance by 2030 to 94%.**

Those highly concerned about the environmental impact are:

- Most likely to let sustainability influence their treatment decisions
- Most likely to anticipate significant influence from sustainability factors by 2030

Regional

Who feels strongly about sustainability claims influencing their decisions?

- **UK: 13% of HCPs** feel the strongest
- **Italy: 36% of HCPs** feel quite strongly
- **Spain: 36% of HCPs** feel quite strongly
- **USA: HCPs are least likely** to prioritise sustainability
- **France and Italy: 60% of HCPs** believe sustainability will play a key role in their treatment decisions by 2030

Who is most swayed by sustainability claims?

- **44% of HCPs in the UK and 43% in Italy** are the most likely to be swayed by sustainability claims
- **Those in the US** are the least likely

By specialty

Oncologists (44%) and **nurses (16%)** are the most likely to consider environmental sustainability when choosing drugs or products.

General surgeons (56%) are the most likely to believe that environmental sustainability will significantly influence their treatment decisions by 2030.

In contrast, **hematologists (12%)** and **neurologists (11%)** are the least likely to feel this way.

Across specialties, there were **minimal differences** in how environmental sustainability claims influenced choice when safety and efficacy data were equal.

Challenges and Barriers



No sustainability claims

Global

55% of HCPs report having seen no sustainability claims for pharmaceutical products and **59% for MedTech** devices.

Regional

HCPs in France, Italy, and Spain are most likely to have seen product claims.

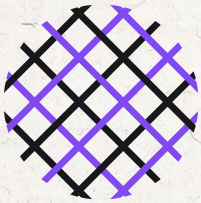
37% of US-based HCPs report seeing none.

By specialty

Pulmonologists are the most likely to have seen product-level claims in the past year, with **27%** encountering 10 or more.

Allergy/immunology specialists are the most exposed to company-wide environmental messaging.

46% of emergency medicine professionals have seen no product-level claims in the last year.



Transparency matters

Global

HCPs find environmental sustainability product claims difficult to understand **(42% for pharmaceutical companies**, and **43% for MedTech).**

HCPs who are highly concerned about environmental impact are more likely to find it easy to understand sustainability information from pharmaceutical **(22%)** and MedTech **(20%)** companies.

Regional

HCPs in Italy and Spain are the most confident. Those in the UK are the least confident.

By specialty

General surgeons are the most likely to find it very easy **(20%)** to understand the environmental sustainability of pharmaceutical products. **Retail pharmacists (19%)**, **nurses (34%)**, and **GPs (31%)** also find it easy to varying degrees. In contrast, **infectious disease specialists** struggle the most, with **35%** finding it very difficult to assess sustainability claims from pharmaceutical companies and **30%** from MedTech companies.

Cost is one of the most significant barriers to choosing environmentally sustainable drugs/products, particularly for GPs (69%), retail pharmacists (73%) and veterinarians (71%). Lack of availability was a key barrier across all categories.



Action plan:
5 principles

Principles

for effective sustainability communications

As Sir David Attenborough reminds us:

> ***We often talk of saving the planet, but the truth is we must do these things to save ourselves.***

Nowhere is this more true than in healthcare. To drive meaningful change in both health outcomes and environmental impact, the industry must confront the barriers in this report - with urgency, clarity, and resolve.

Accelerating progress requires agile, targeted communication and marketing strategies that resonate across diverse regions and specialities, especially in paradoxical areas where concern is high but action remains stalled.

Most importantly, remember that sustainability is not a one-time message, it's an ongoing journey. Celebrate progress, however incremental, and keep inspiring action through credibility and purpose.

In the next section, we outline five principles that offer a clear framework for effective sustainability communications in healthcare.

5 core principles

1. **Clear, consistent messaging**
2. **Radical transparency, tangible action**
3. **Build belief through collaboration**
4. **Personalise and specify product-level benefits**
5. **Foster a sustainably conscious culture**

1 Clear, consistent messaging

As Environmental, Social & Governance (ESG) credentials play an increasingly pivotal role in purchasing decisions, healthcare companies are presented with a powerful opportunity to close the sustainability communication gap and build deeper trust with their stakeholders.

Communicate with clarity and purpose:
Ensure sustainability messaging is consistent across all channels.
Use clear, accessible language that avoids unnecessary technical jargon.

Bring sustainability stories to life:
Use a rich mix of formats. For example, blogs, short films, infographics, and animations can boost engagement, understanding, and long-term recall.

Elevate impact through omnichannel excellence:
Embed sustainability into your broader omnichannel strategy to reach healthcare audiences where they are, with messaging that informs, inspires, and drives action.

How

- **Simplify complex claims using visuals, infographics, and case studies**
- **Offer digital tools, such as carbon calculators, to enable HCPs to assess impact**
- **Train sales teams to communicate sustainability claims effectively**
- **Launch campaigns that inspire action among HCPs and patients**

2 Radical transparency, tangible action

Credibility starts with honesty, so environmental claims must move beyond corporate gloss. Be open about both achievements and shortcomings, what's improved, what hasn't yet, and what's next. This 'eco-transparency' approach fosters trust and disarms scepticism, especially among HCPs, 85% of whom say pharma should be upfront about environmental impact.

Highlight both progress and gaps: Go beyond the headline achievements. Clearly outline what has been done, what hasn't, and why.

Position sustainability as an ongoing journey: Reframe sustainability not as a destination, but as a commitment to continual progress.

Mark milestones to motivate momentum: Share progress in ways that celebrate wins without overstating them whilst recognising tangible steps can inspire action.

How

- **Publish lifecycle assessments (LCAs) - and carbon footprints with plain-language summaries**
- **Include the "lowlights" alongside the wins**

3 Build belief through collaboration

Don’t go it alone. Environmental credentials gain legitimacy through independent validation. Key opinion leaders, recognised eco-certifications, awards, and third-party endorsements help strengthen claims. This is particularly vital in pharma, where scientific evidence is paramount.

Frame sustainability as a shared mission: Develop campaigns that unite HCPs, patients, and industry peers around collective action, showing change is possible when we all play our part.

Set clear sustainability expectations for every partner and use your influence to embed greener practices at every link in the chain.

Champion industry-wide standards: Collaborate with peers, regulators, and trade bodies to establish shared benchmarks for environmental responsibility. This fosters consistency, accountability, and sector-wide progress.

Back claims with diverse, credible proof: Go beyond token certifications. Use a mix of independent audits, expert endorsements and transparent reporting to create a robust and credible foundation for every claim.

How

- **Include backing from ISO standards, environmental NGOs, or healthcare professionals themselves to substantiate claims**
- **Advocate for regulatory frameworks that incentivise eco-friendly practices**

4 Personalise and specify product-level benefits

HCPs care about outcomes, both clinical and environmental. Claims are most effective when they link back to patient care, cost savings, or systemic improvements.

Show how greener choices support patient outcomes: Reducing system-wide costs, or streamlining care delivery.

Pinpoint exactly what makes a product more sustainable: Whether it's reduced plastic, lower emissions, or circular packaging. Be specific, be visual, and tie it back to everyday use.

Use human-centred narratives to link sustainable decisions to wider societal benefit: Healthier communities, reduced pollution, and a future worth fighting for. Because facts tell, but stories sell.

How

- **Comparing environmental gains to familiar concepts (e.g. "X fewer inhalers = Y less plastic = Z patient benefit"), which makes abstract impacts tangible**
- **Share real-life case studies and success stories to enable customers to envision the distinct value of these efforts**

5 Foster a sustainably conscious culture

Truly impactful sustainability starts from within. Building a credible, company-wide approach means embedding environmental responsibility into your culture, where every team, from procurement to product, feels informed, empowered, and accountable.

Make progress visible: Regularly communicate wins, metrics, and lessons learned. Transparency fosters trust and reinforces that sustainability isn't a trend, it's how you do business.

Make data meaningful: Create internal dashboards or snapshot reports and key milestones. When people can see the impact, they're more likely to act.

Celebrate internal champions: Recognise individuals or teams driving greener behaviours, whether through smarter sourcing, eco-efficient travel choices, or waste reduction.

How

- **Develop short, engaging e-learning courses on climate change, sustainability best practices, and company policies**
- **Establish internal ambassadors and sustainability committees where employees can spearhead eco-friendly projects**
- **Keep the conversation alive with townhalls, open forums, and storytelling-driven newsletters to regularly share both progress and challenges**



Conclusion

Conclusion

Health can’t wait

The good news? Our industry recognises it. HCPs, patients and forward-thinking pharma leaders are calling for faster, bolder action. But, barriers like cost, availability, and clarity of communication could be blocking the path forward for some.

This whitepaper sets out not just the problem, but the prescription. A clear, actionable framework to help accelerate progress.

Because healthcare’s duty to 'do no harm' extends beyond the clinic doors, it must now include the ecosystems, communities, and climate that sustain human life.

To secure the future of our industry, sustainability communications and transparent environmental claims must be central to all our endeavours.

The call to action

Many pharma and MedTech companies are already on this journey, embedding sustainability into core strategy, partnering across sectors, and shifting supply chains.

We are at the tipping point.

Now is the time to lead.



Commit to the 5 principles and embed them into your business



Engage in the conversation
Share your sustainability commitments and collaborate to drive industry-wide change



Make sustainability a competitive advantage
It’s not just the right thing to do; it’s what patients and HCPs demand

Interested?

Get in touch to find out more



If you're looking to strengthen your sustainability story, we're here to help.

From shaping credible environmental claims to building communications that resonate with HCPs and stakeholders, Inizio brings deep sector expertise and creative rigour.

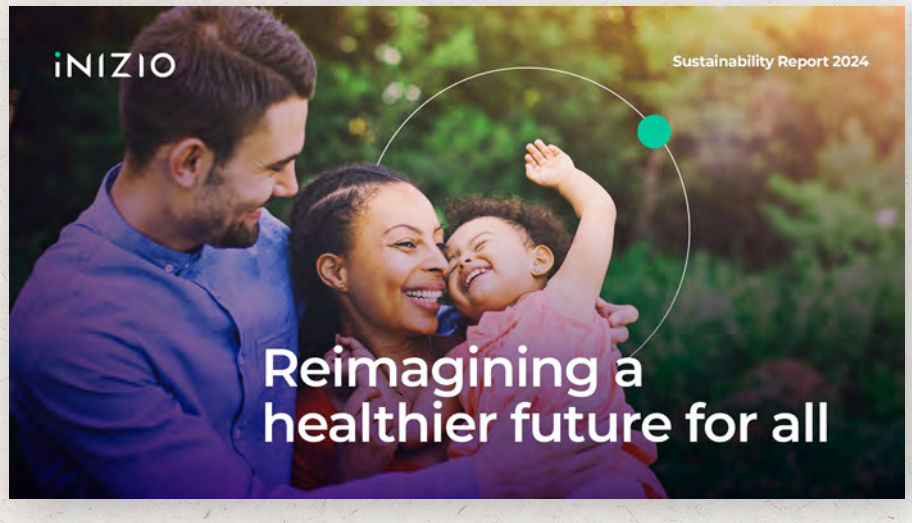
Get in touch to explore how we can support your journey towards more impactful, transparent, and trusted sustainability communications.

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At Inizio, sustainability means action

From cutting our carbon footprint to advancing health equity and inclusive growth, we're committed to doing business in a way that benefits people and planet. Our Climate Transition Plan sets out a clear roadmap, backed by governance, accountability, and a deep belief in doing the right thing.



For more information click here:
Sustainability at Inizio

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