Sustainable Procurement Barometer 2026

How Leading Businesses Are Turning Sustainable Procurement Into Measurable Value and Resilience

ecovadis In collaboration with accenture

Contents

Foreword

The defining challenge for today's chief procurement officer is building resilience and competitive advantage in the face of unprecedented uncertainty. With supply chain disruptions costing the global economy $86 billion last year alone, businesses cannot afford to wait for regulatory certainty or perfect data to take action.

What's increasingly clear is that the most resilient and competitive organizations no longer treat sustainable procurement as a parallel program. They're integrating it into the core of how they operate, moving from reactive to proactive and from compliance-led to strategic.

Now in its ninth edition, this year's Sustainable Procurement Barometer examines the practical capabilities procurement leaders are building to perform under pressure: greater supply chain visibility, deeper integration of supplier data into day-to-day workflows, and partnerships that drive innovation.

Drawing on insights from 1,000 global businesses and nearly 2,000 suppliers, the report shows where programs are maturing, where data gaps continue to slow progress, and how leading teams are building a new procurement "operating system" that balances compliance readiness with resilience and business value.

Pierre-François Thaler
Co-CEO & Co-Founder, EcoVadis

Sustainability has entered its most consequential phase. For many organizations, ambition is no longer the main barrier to progress; execution is. Leaders now face the challenge of turning commitments into measurable outcomes while navigating volatility, regulatory divergence, and persistent cost pressures.

Meeting this moment requires a new operating model. By embedding sustainability intelligence directly into sourcing, contracting, supplier management, and product development, procurement teams can make faster, more informed decisions. With these insights integrated into daily workflows, organizations can translate sustainability goals into operational and financial outcomes.

But putting sustainability into practice at scale exposes a new challenge: the growing complexity of global supply chains is stretching traditional governance models beyond their limits. AI is becoming a core lever of this shift, enabling procurement teams to move from reactive oversight toward proactive, intelligence-led decision-making.

This report explores how leading organizations are building these capabilities today and what it takes to scale them across complex global supply chains.

Matias Pollmann-Larsen
Global Risk, Resilience
and Sustainable Value Chain Lead

Executive Summary

Businesses are entering a new phase of supply chain transformation. Sustainable procurement is no longer just about compliance — it is now a key performance lever driving resilience, protecting margins, and building competitive advantage. This shift is unfolding amid rising geopolitical volatility, climate disruption, and regulatory pressure.

Yet most organizations still struggle to prioritize sustainability within procurement. Data gaps, competing priorities, and challenges in defining the value case often keep it siloed instead of embedded into strategy.

As a result, procurement teams continue to prioritize immediate value, primarily cost savings. This short-term focus increases exposure to future regulations, climate disruptions, and supply continuity risks, while leaving significant sources of strategic value untapped across the supply base. This includes cost avoidance from regulatory exposure, protection of revenue from supply disruptions, access to new markets, product innovation, and stronger brand trust with customers and stakeholders.

Leading organizations are taking a different approach. They are embedding sustainability directly into procurement strategy and operating models. By integrating ESG data and insights into sourcing decisions, category strategies, and supplier relationships, leaders are simultaneously balancing goals related to cost, resilience, growth, and sustainability.

AI is also starting to play a key role in accelerating this shift by improving visibility and decision-making at scale, enabling procurement teams to operationalize supplier intelligence more consistently across complex, multi-tier supply networks.

Based on an in-depth survey of executives and senior leaders across 1,000 multinationals and nearly 2,000 suppliers, this report analyzes how sustainable procurement programs are evolving and where leading organizations are pulling ahead. It highlights the capabilities required to turn sustainability from a reporting exercise into a driver of resilience, innovation, and competitive advantage. It compares sustainable procurement leaders – the top-performing 10% of respondents based on our methodology – to the rest.

Our research shows that leading organizations are rewiring their programs around five imperatives:

1. Measure sustainability by business value, not just compliance readiness
2. Build end-to-end supply network visibility
3. Embed sustainability into every buying decision
4. Activate suppliers as strategic partners in transformation
5. Turn sustainability into a platform for innovation and growth

Who we surveyed

1,000
multinational organizations with $1B+ in revenue

20
industries covered

50%
of respondents are C-suite level

~2,000
suppliers across global supply chains

Geographic breakdown of respondents

35%
The Americas

33%
Europe and the Middle East

32%
Asia-Pacific

Key findings: Sustainable procurement trends in 2026

Ambition is rising and supplier data is improving. Yet many organizations still struggle to translate ambition into action because sustainability is not yet fully integrated into procurement strategy, incentives, processes, and decision-making.

01

The value case is expanding beyond compliance.

Compliance readiness remains the most widely cited benefit of sustainable procurement, with nearly 70% of respondents naming it as a key outcome. But the value story is expanding. More than half report significant gains in risk reduction and innovation. Leaders identify innovation as the primary benefit of their programs, followed by risk reduction, compliance, and revenue growth.

80%

of leaders cite innovation as a leading driver of sustainable procurement ROI (vs. 54% of others)

02

Tier 1 visibility is improving quickly – Tier 2 and beyond remain blind spots for most.

Organizations are making measurable progress where they have the most direct influence: roughly half report visibility into 75% or more of their Tier 1 suppliers. Transparency drops sharply beyond this. Only 12% have visibility into more than half of their Tier 2 suppliers. Understanding these deeper tiers is critical: hidden risks and disruptions often originate beyond Tier 1, while greater transparency can unlock opportunities for resilience, decarbonization, and supplier innovation.

48%

of respondents say their organizations now have visibility into 75%+ of Tier 1 suppliers (vs. 27% in 2024)

03

Carbon data maturity is rising, but supplier readiness lags.

Buyers are collecting more comprehensive and granular carbon data and moving toward decision-grade Scope 3 insights — data that is robust enough to inform sourcing decisions and supplier engagement strategies, including product-level carbon footprints. However, supplier capabilities remain uneven. Many still lack the systems and expertise required to provide accurate primary emissions data.

85%

of leaders have started collecting product-level carbon data from suppliers (vs. 65% of others)

30%

of suppliers provide no primary emissions data to buyers

04

ESG integration is now the baseline, though full digital integration is rare.

Nearly all respondents (98%) have begun embedding ESG intelligence into core procurement processes, either manually or through partial or fully digital methods. However, end-to-end digital integration remains limited. Most organizations still operate with partial integration across key systems, and only a small minority have fully digitized ESG data flows across procurement and risk management processes.

~30%

of respondents report full digital integration across procurement analytics and risk management processes — the highest integration rate among core procurement processes

05

Buyers are scaling supplier engagement through higher-impact actions.

Supplier self-assessment questionnaires (SAQs) remain the most common engagement tool. But organizations are scaling higher-impact actions, like third-party sustainability ratings, to more suppliers.

Leaders differentiate by focusing on the suppliers that matter most and pairing clear expectations with tangible support and incentives, including training, decarbonization initiatives, and joint innovation programs. Still, a credibility gap persists: many suppliers report that their customers are not fully committed to sustainability.

25%

of buyers cover more than half of spend with third-party sustainability ratings

Only **41%**

of suppliers see their customers as highly committed and actively engaged in driving sustainability

06

AI is emerging as a key enabler of sustainable procurement.

Over half of organizations have moved beyond experimenting with AI tools and are now deploying them operationally, particularly for analytics, data validation, and risk screening. A small but growing share (13%) report widespread organizational deployment.

But suppliers are lagging behind on AI adoption. This emerging digital asymmetry risks widening existing ESG data gaps and limiting visibility across supply networks.

68%

of buyers have deployed AI in their programs (55% use operational tools and 13% have widespread deployment)

36%

of suppliers currently have no plans to adopt AI tools

Barometer Readings:
The State of Sustainable Procurement

Macro-level trends shaping the procurement landscape

Global disruptions, regulatory expansion, and rapid technological change are reshaping how procurement teams manage risk, resilience, and value creation across supply chains.

The resilience premium is rising as supply chain disruptions erode enterprise value

Resilience is becoming a core competitive advantage in a global trade environment growing more complex and unpredictable. Beyond persistent headwinds like inflation and energy price volatility, procurement teams must navigate disruptions driven by geopolitical conflict and more frequent extreme-weather events.

Trade tensions and tariffs also remain a front-and-center concern, with nearly three-quarters of US executives identifying them as top supply chain threats. For procurement leaders, this means rethinking sourcing strategies, supplier diversification, and risk visibility across supply networks.

Organizations proactively building resilience are better insulated against shocks and can respond more effectively to multi-tier sustainability risks. Their efforts are paying off, with resilient organizations seeing 3.6% higher revenue growth than less resilient peers.

Despite uncertainty, organizations must go beyond the compliance baseline

Mandatory ESG reporting and due diligence continue to raise the bar for sustainable procurement programs, even as some jurisdictions delay rules. In late 2025, the EU made changes to its CSRD and CSDDD directives that significantly narrowed coverage, while California's SB 253 faces legal challenges and evolving implementation timelines.

At the same time, disclosure expectations are expanding globally, including China's new climate reporting standard. For procurement teams, this shift increases the need for reliable supplier ESG and carbon data to support reporting, due diligence, and supply chain risk management.

While supply chain visibility beyond Tier 1 remains limited for most, organizations that wait for regulatory clarity or perfect data risk falling behind peers that are already strengthening supplier intelligence.

By 2029, an estimated 40% of organizations are expected to achieve deep visibility into Tier 3 supplier networks, driven by the combined impact of regulation and technological innovation.*

AI is redefining the value frontier for procurement

Beyond uncovering risks deeper in the supply chain, AI is reshaping core procurement workflows and helping organizations drive supplier innovation and unlock new value.

But few currently achieve this at scale. Those that do combine deep AI integration with decision-grade supplier ESG intelligence to drive faster decision-making, support targeted improvements, and build a sustained competitive edge.

The performance gap is growing. Organizations with mature AI-led processes are achieving roughly 2.5x higher revenue growth and productivity than peers. Nearly 40% believe AI-enabled supply chain operations will improve circularity and efficiency. Organizations also estimate that integrating AI into decarbonization strategies could accelerate emissions reductions by 16%.

With the green economy projected to reach $7 trillion by 2030, procurement teams that deploy AI and integrate ESG data into sourcing decisions and product design will be best positioned to capture this opportunity.

> *The stakes are clear. Supply chain disruptions cost organizations more than $1.6 trillion in potential annual revenue growth, and 52% lose at least a month of operating capacity each year.*

* Gartner, Innovation Insight: Intensify Focus on Multitier Supplier Visibility (2026)

Where programs stand today

Sustainable procurement is entering a more mature phase, with programs becoming better formalized, resourced, and aligned with broader business strategies. Despite this progress, even many organizations with established programs have yet to fully embed sustainability into decision-making processes.

- **Nine out of ten programs have been running for at least four years and a quarter for more than a decade.** The average program age now stands at over seven years globally.
- **Program maturity increases with organizational size.** Organizations with more than $30 billion in revenue average roughly nine years of program maturity, compared with just over six years for those in the $1–10 billion range.
- **Dedicated teams are becoming more common.** More than half of organizations now have a dedicated sustainable procurement team, rising to 81% among those with programs running for more than ten years.

Momentum is building, but capability gaps remain

- **Only 15% of procurement teams consider themselves "advanced" in integrating sustainability into procurement processes.** More than one-third report "proficient" capabilities, while 41% describe their efforts as "developing" — indicating that most organizations are still building foundational integration capabilities.
- **Capability maturity strongly correlates with program duration and company size.** Nearly all advanced teams come from organizations with more than seven years of sustainable procurement activity, and larger enterprises are significantly more likely to report having advanced capabilities.

Top program drivers

Most procurement teams currently focus on risk management and resilience, but there is an ongoing strategic shift toward innovation and value creation.

- **Risk and compliance anchor programs today but will not be the most important long-term differentiators.** Managing sustainability risk in the supply chain and meeting regulatory requirements is the leading program driver today, cited by 56% of respondents. Only a third expect these to remain among the top-three drivers in the near term.
- **Net-zero progress and supplier transformation will move front and center.** Looking ahead, organizations expect sustainability and net-zero goals to re-emerge as a top driver (48%). Future differentiation will also come from supplier innovation, which has seen the biggest leap in predicted importance, and broader value creation through partnerships, talent, and growth.

Top program drivers now versus the next two to three years

Percentage of respondents identifying each as a top-three driver

2026		Next 2-3 years	
Managing sustainability risk & compliance	56%	Delivering on sustainability & net-zero goals	48%
Delivering on sustainability & net-zero goals	39%	Driving supply chain innovation & transformation	37%
Enhancing supply chain resilience	37%	Managing sustainability risk & compliance	32%

Program focus areas and regional priorities

Top sustainability focus areas

Procurement's sustainability agenda is reorienting toward a more selective, capability-building mix – combining core long-term priorities with fast-emerging risk areas.

- **Carbon management remains the strategic constant.** Managing supply chain emissions and advancing net-zero progress is still the leading priority, cited as a top-three program focus area by 54% of organizations. Teams expect carbon to remain just as important over the next two to three years.
- **Supplier labor practices are foundational to programs.** Supplier labor practices were the top sustainability priority in 2024 and remain central today. High labor standards are becoming a baseline expectation as programs mature, driven by continued stakeholder scrutiny and tightening due diligence requirements. Organizations face growing pressure to increase visibility into working conditions and human rights risks across their supply base, including forced labor and other issues that could have severe reputational impact.
- **Value levers and emerging risks are rising on the agenda.** As core priorities become embedded in program foundations, organizations are shifting their focus toward value-creation opportunities — such as circularity and responsible AI — and emerging risk areas like data ethics and digital traceability.

Regional priorities

There is global convergence around three core topics: net-zero and carbon management, supplier workforce practices, and circularity and resource efficiency. But regional variation on lower-ranking focus areas reflect differences in regulatory and market trajectories.

Global convergence: The top sustainability priorities are the same across regions

Percentage of respondents citing each as a top-three priority

	Americas	EMEA	APAC
1. Net-zero & carbon management	51%	58%	51%
2. Supplier workforce & labor practices	43%	47%	46%
3. Circularity & resource efficiency	43%	41%	43%

The Americas

The Americas has a relatively balanced profile of secondary priorities, giving similar weight to ethical governance, regulatory compliance, and non-carbon environmental impacts.

Europe and the Middle East

In Europe and the Middle East, institutional and regulatory pressure drive divergence, with ethical governance and compliance standing out as the clearest secondary priorities shaping regional focus.

Asia-Pacific

Compared to the other regions, Asia-Pacific over-indexes on driving supplier equity and digital traceability. This reflects its status as a global supply chain hub.

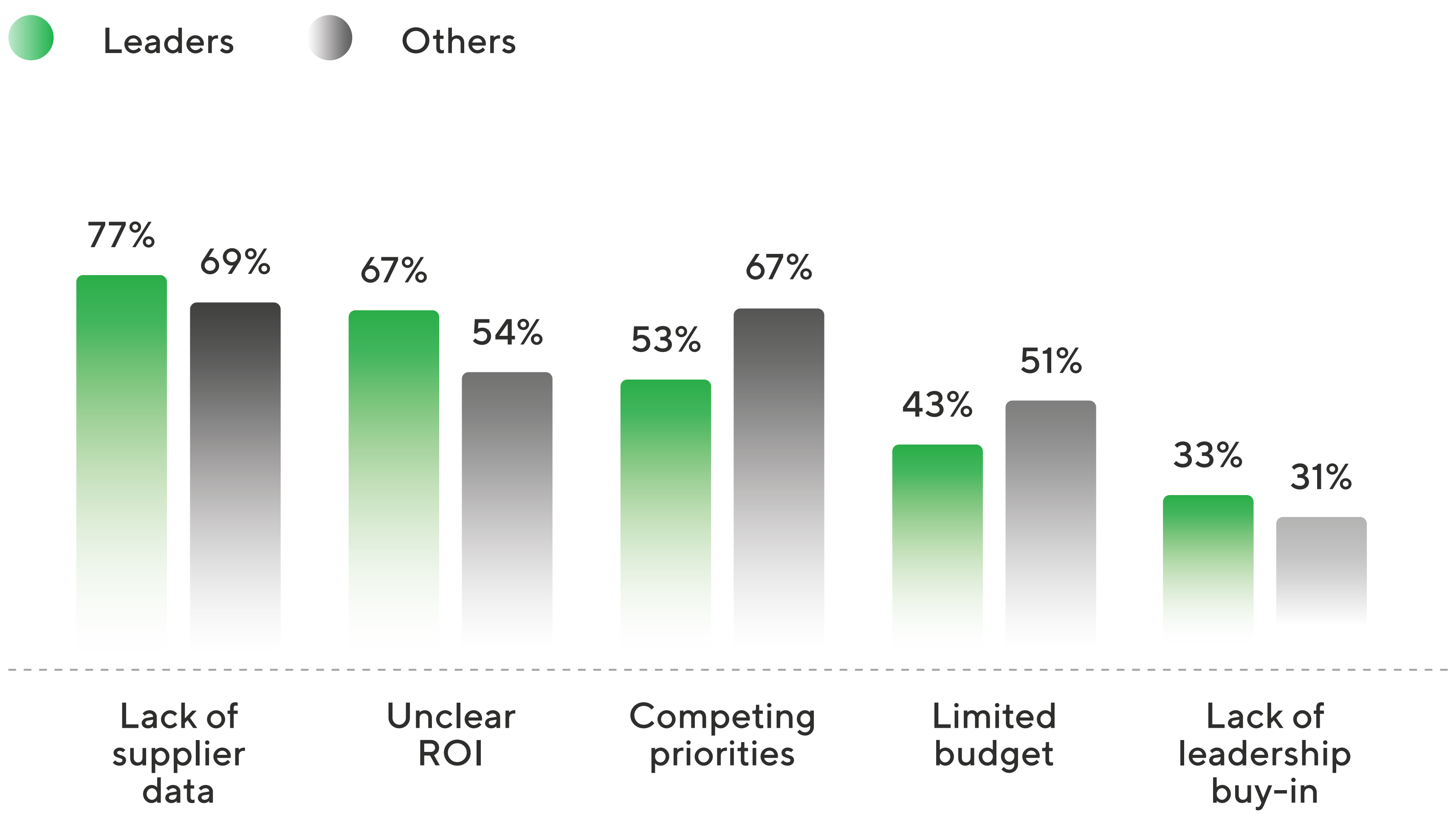
Investment in sustainable procurement

As sustainable procurement programs mature, organizations increasingly face a new challenge: securing sustained investment to scale their impact. Across all respondents, supplier data gaps and competing priorities have emerged as the leading barriers to achieving this.

Leaders are even more likely to cite data limitations as a key constraint (77% vs. 69%). They also face greater scrutiny around the clarity of the value case. While all organizations encounter similar challenges related to limited budgets and competing priorities, leaders report greater pressure to demonstrate measurable business value and strengthen supplier data foundations.

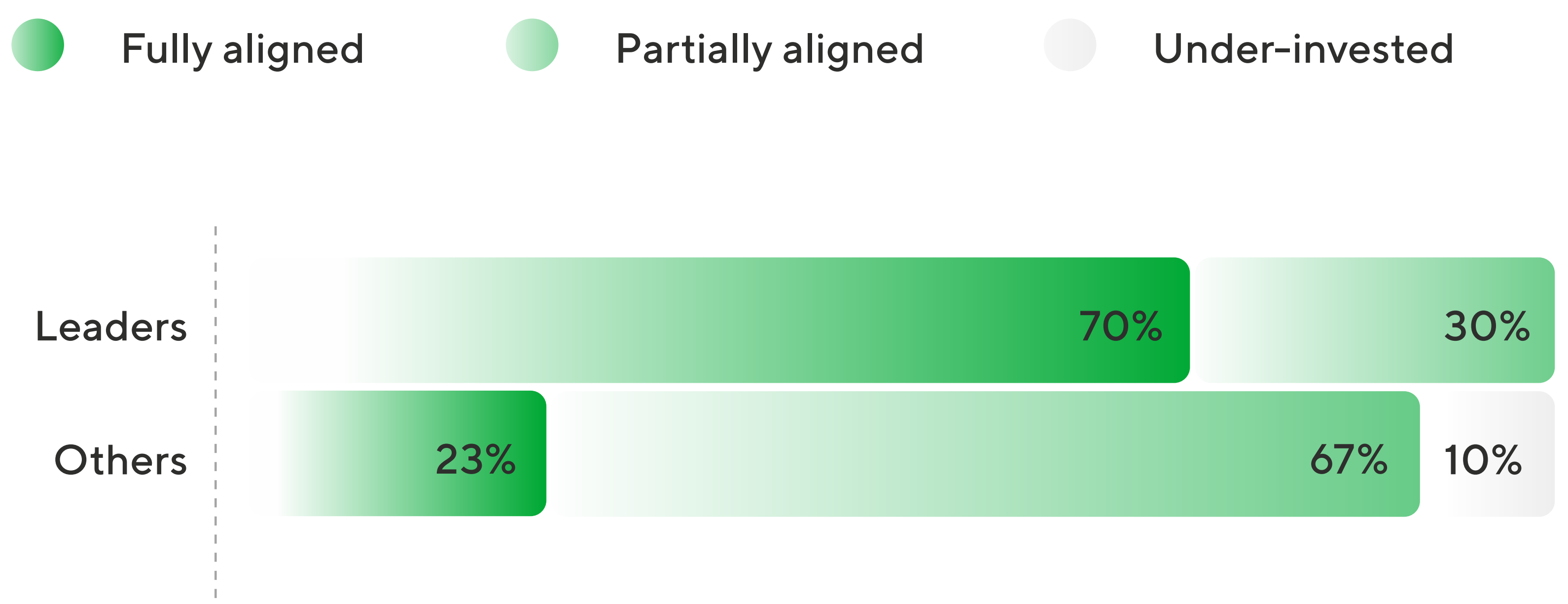
Primary barriers preventing sufficient investment: Leaders vs. others

Percentage of respondents reporting each as a barrier



Investment alignment with sustainable procurement priorities: Leaders vs. others

Percentage of respondents indicating each level of alignment



Investment in sustainable procurement ultimately follows the same principles as any other strategic initiative: it requires a clear business case and measurable financial impact.

Leading organizations distinguish themselves in three important ways:

- **Quantify the cost of inaction:** They model disruption exposure, regulatory penalties, carbon costs, and reputational risks to make the financial implications of inaction tangible.
- **Translate sustainability into financial outcomes:** They link emissions reduction to cost avoidance, resilience to revenue protection, and supplier innovation to margin expansion and market growth.
- **Protect long-term investments:** They ring-fence budgets and position sustainable procurement as part of a multi-year digital procurement transformation rather than a discretionary or short-term program.

The Sustainable Procurement Operating System

This year's analysis reveals five core pillars enabling organizations to scale sustainable procurement and deliver measurable outcomes across compliance, decarbonization, resilience, innovation, and value creation.

1. Value framework and ROI measurement
2. ESG visibility and intelligence
3. Integration into procurement decisions
4. Supplier engagement and improvement
5. Innovation and value creation

Together, these pillars form an operating system for building resilient, value-driven supply chains. They enable organizations to move beyond fragmented initiatives and embed sustainability into procurement strategy, decision-making, and supplier relationships.

Organizations tend to build these pillars progressively, with each one reinforcing the next: from developing a value framework and gaining supplier visibility to integrating ESG intelligence into procurement decisions, activating suppliers to drive improvement, and ultimately scaling innovation and value creation across the supply base.

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The following sections highlight the progress organizations are making across key capabilities in each pillar — and where critical gaps still limit impact.

	1. Value framework and ROI measurement	2. ESG visibility and intelligence	3. Integration into procurement decisions	4. Supplier engagement and improvement	5. Innovation and value creation
Why it matters	A clear value framework is needed to quantify ROI and secure sustained investment.	Organizations cannot manage the sustainability risks or opportunities they cannot see.	ESG data only drives impact when it is embedded directly in procurement decisions.	Targeted engagement enables supplier collaboration to drive improvement and value.	Innovation is where sustainable procurement moves beyond compliance and toward value.
What the data shows	The value of sustainable procurement is broader and more measurable than ever. More than half (57%) now cite innovation as a key ROI driver of their program.	Tier 1 visibility is rising: nearly 80% of organizations now have visibility into the performance of 50%+ of suppliers at this tier. They are also collecting more primary carbon data than ever, including at the product level.	ESG integration is nearly universal (98%), but full digital integration is still uncommon (30% analytics; 29% risk management).	High-impact engagement is rising (26% now cover 50%+ of spend with ratings), but only 41% of suppliers say their customers are highly committed to sustainability.	AI adoption is growing among buyers (55% operational use; 13% widespread use), while suppliers lag behind (36% have no AI plans).
What leaders do differently	Leaders link sustainability outcomes to financial metrics executives trust. They develop value frameworks that go beyond conventional cost models and capture the full value spectrum.	Leaders build continuous, validated, AI-enabled multi-tier intelligence. This provides the foundation for faster risk management, effective supplier engagement, and supply chain resilience.	Leaders embed sustainability criteria directly into sourcing, SRM, risk, and performance systems. They align governance and cross-functional accountability so sustainability shapes commercial decisions.	Leaders segment suppliers by risk, spend, and opportunity, combining collaboration, incentives, and clear key performance indicators (KPIs) to drive improvement and value.	Leaders move from supplier monitoring to co-developing solutions that cut emissions, drive efficiency, and generate revenue. They use AI and data to identify innovation opportunities and scale pilots.

Pillar 1

Value framework and ROI measurement

Develop the value framework and quantify value across cost, compliance, innovation, and resilience to secure executive buy-in.

Why it matters:

As sustainable procurement matures, the focus is shifting from commitments to performance. Procurement teams are increasingly expected to translate sustainability objectives into measurable financial and operational outcomes.

To secure sustained investment and executive support, sustainable procurement must be positioned as a driver of cost control, resilience, and innovation — not only compliance.

Leading organizations demonstrate this through clear value frameworks and metrics that link supplier sustainability performance to total cost of ownership, disruption risk reduction, market access, and customer trust.

What the data shows: The value case is expanding

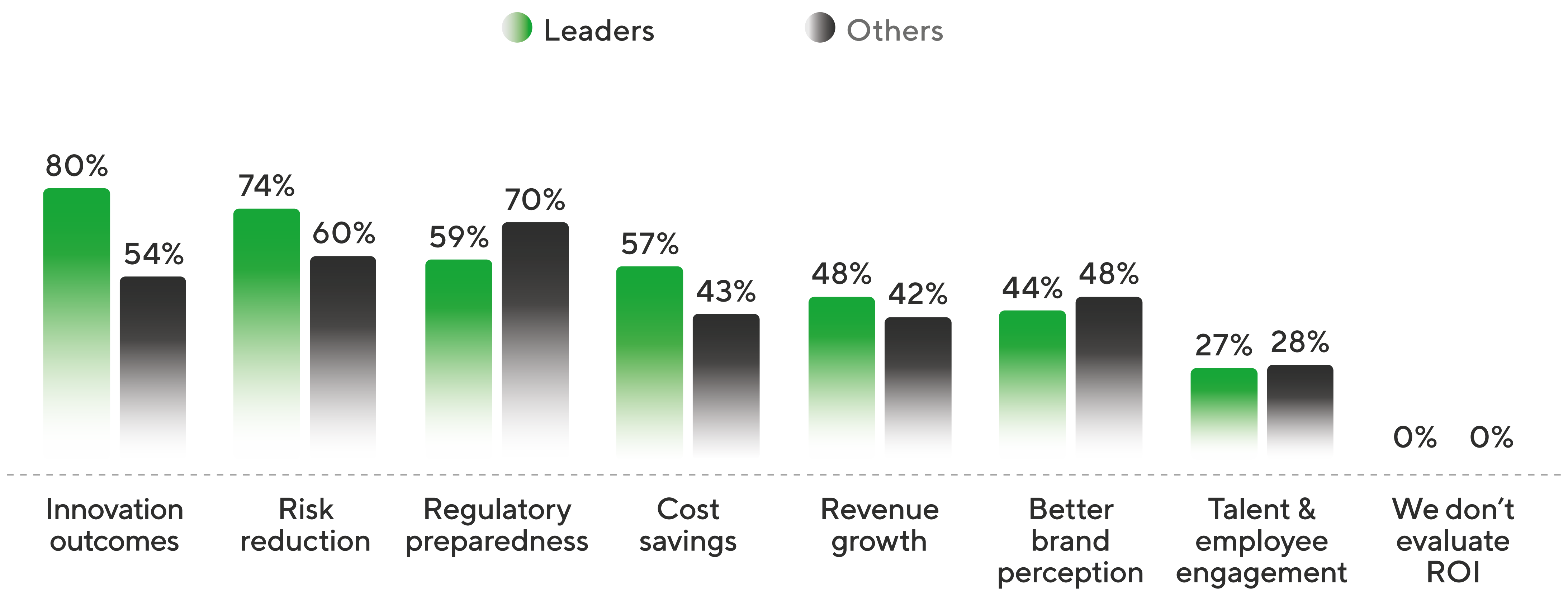
A growing number of organizations recognize that the value of sustainable procurement extends beyond compliance and risk mitigation.

Across all respondents, the most commonly reported benefits of sustainable procurement are regulatory preparedness (69%), risk reduction (62%), and innovation outcomes (57%).

This reflects a shift from the risk-dominated narrative of earlier years, with innovation and growth increasingly emerging as important sources of value.

Value-driven benefits organizations realize from their programs: Leaders vs. others

Percentage of respondents identifying each as a benefit of their program



How organizations are measuring program ROI

Our analysis found that organizations capture sustainability-related value across three levels: foundational, operational, and strategic. Leaders consistently measure value across all levels and are more likely to link sustainability performance to commercial outcomes.

- **Foundational:** 65% of leaders use total cost of ownership tools to capture sustainability-related value (vs. 55% of others).
- **Operational:** 81% of leaders quantify financial ROI from sustainable procurement initiatives (vs. 67% of others).
- **Strategic:** 47% of leaders track sustainability-enhanced revenue growth and profitability metrics (vs. 27% of others).

Supplier spotlight: Most suppliers report value from sustainability

Suppliers are under growing pressure from customers to provide transparency and make progress on sustainability challenges. The vast majority (90%) say they are realizing value from their sustainability efforts. However, most of this currently takes the form of customer-related benefits and only 28% currently report "improved revenue and market opportunities."

Top benefits suppliers see from their sustainability efforts

Percentage of respondents reporting each as a top-three benefit

62% improved relationships and collaboration with customers

58% stronger brand recognition and reputation

52% enhanced compliance and risk management

Leader insights: How leaders build the business case at scale

High-ROI* organizations link sustainability outcomes to financial metrics executives trust and track them consistently to build buy-in and secure investment.

- **Organizations reporting higher ROI are significantly more likely to report strong sustainable procurement capabilities.** 63% rate themselves "proficient" or better, compared with 42% of low-ROI peers. They are also 1.6x more likely to report having "advanced" capabilities.
- **Building this capability takes time.** 63% of high-ROI organizations have programs that have been running for more than seven years, suggesting sustained investment is required to build the systems needed to measure value.
- **Transparency reinforces the value case.** Leaders are more likely to report progress externally through net-zero commitments (63% vs. 50%), third-party sustainability platforms (48% vs. 36%), and regulatory disclosures (71% vs. 62%), strengthening accountability and executive buy-in.
- **Regulations are raising the stakes.** As carbon pricing mechanisms expand and Scope 3 reporting becomes mandatory across markets, sustainable procurement decisions carry even greater financial implications.

* High-ROI organizations are those that reported realizing at least four business benefits from their programs (of the seven benefits included in the survey).

What leaders do differently

Respondents report a wide range of value-driven benefits, but many still struggle to link supply chain sustainability outcomes to business performance. This challenge persists even among leaders, with 67% citing unclear ROI as a barrier (vs. 54% of others).

Leading procurement teams close this gap by building structured value frameworks that capture the full business impact of sustainability.

Key actions include:

- **Define holistic value metrics:** Leaders measure the full spectrum of value, including risk reduction, cost savings, resilience, brand trust, and revenue growth.
- **Embed sustainability in investment governance:** Sustainability criteria are integrated into sourcing decisions, supplier initiatives, and category strategies.
- **Align across functions:** Procurement works closely with finance, risk, and sustainability teams to define baselines, attribution rules, and validation methods.
- **Apply risk-adjusted investment models:** Leaders incorporate lifecycle costs, resilience benefits, and long-term efficiency gains into ROI calculations.
- **Track value over time:** Dedicated budgets and consistent measurement demonstrate the compounding returns of sustainable procurement investments.

Case study: How Schneider Electric makes the ROI of supplier sustainability tangible

Schneider Electric frames supplier sustainability in practical business terms: use less energy, reduce waste, improve operational efficiency, and solve issues that create long-term risk.

Its program moves beyond audit-based oversight into measurable supplier transformation, combining risk management, ratings, compliance, and targeted improvement in transformational initiatives. Schneider Electric links progress to enterprise governance through public reporting and incentive structures, helping position sustainability as a business performance driver rather than a side program. It also emphasizes supplier enablement, pairing expectations with practical support and focusing not just on identifying issues, but on helping suppliers solve them.

The approach is pragmatic: start with initiatives like energy efficiency that generate immediate supplier savings, then build from there.

Schneider Electric

Key insights

- **Focus effort where impact is highest:** Schneider Electric's top 1,000 suppliers account for roughly 65% of supply chain emissions.
- **Link sustainability to operational gains:** Energy and efficiency improvements help make the business case visible to suppliers and internal teams.
- **Embed accountability into governance:** Progress is reported quarterly, with sustainability performance tied to incentives.

"Sustainability is about doing the same, or more, with less. That's the ROI story suppliers can act on."

Christophe Quiquempoix
VP Sustainable Procurement, Schneider Electric

ESG visibility and intelligence

Leverage AI and digital solutions to scale multi-tier visibility, enabling enhanced regulatory readiness and supply chain resilience.

Why it matters:

Multi-tier supplier visibility is the foundation of effective sustainable procurement. As climate risks intensify and global regulations expand, teams need reliable, validated data on labor and human rights, environmental issues, and Scope 3 emissions deep within the value chain. Without structured visibility beyond Tier 1, organizations face greater risk of operational disruptions, compliance failures, and missed sustainability targets. This can erode brand equity and long-term shareholder value.

With deeper visibility, leaders gain access to a continuous stream of decision-grade ESG intelligence to inform sourcing, risk mitigation, and decarbonization strategies. AI helps operationalize this at scale by automating data validation, connecting signals across tiers, and surfacing decision-ready insights in the workflows teams rely on. This transforms visibility into an engine for supplier collaboration and innovation, helping teams move from risk monitoring toward systemic resilience and value creation.

What the data shows: Multi-tier visibility is improving

Visibility into supplier sustainability performance across supply chain tiers is critical to building effective intelligence capabilities. Organizations are gaining deeper insight into Tier 1 suppliers, but visibility remains limited further upstream.

The share of organizations with visibility into more than three-quarters of Tier 1 suppliers has increased from 27% in 2024 to 48%. However, visibility drops sharply beyond Tier 1. Nearly 90% of organizations report visibility into less than half of their Tier 2 suppliers, and Tier 3 remains largely opaque.

Because many sustainability risks and carbon hotspots originate upstream, improving transparency across deeper supply tiers represents the next frontier for both risk management and value creation.

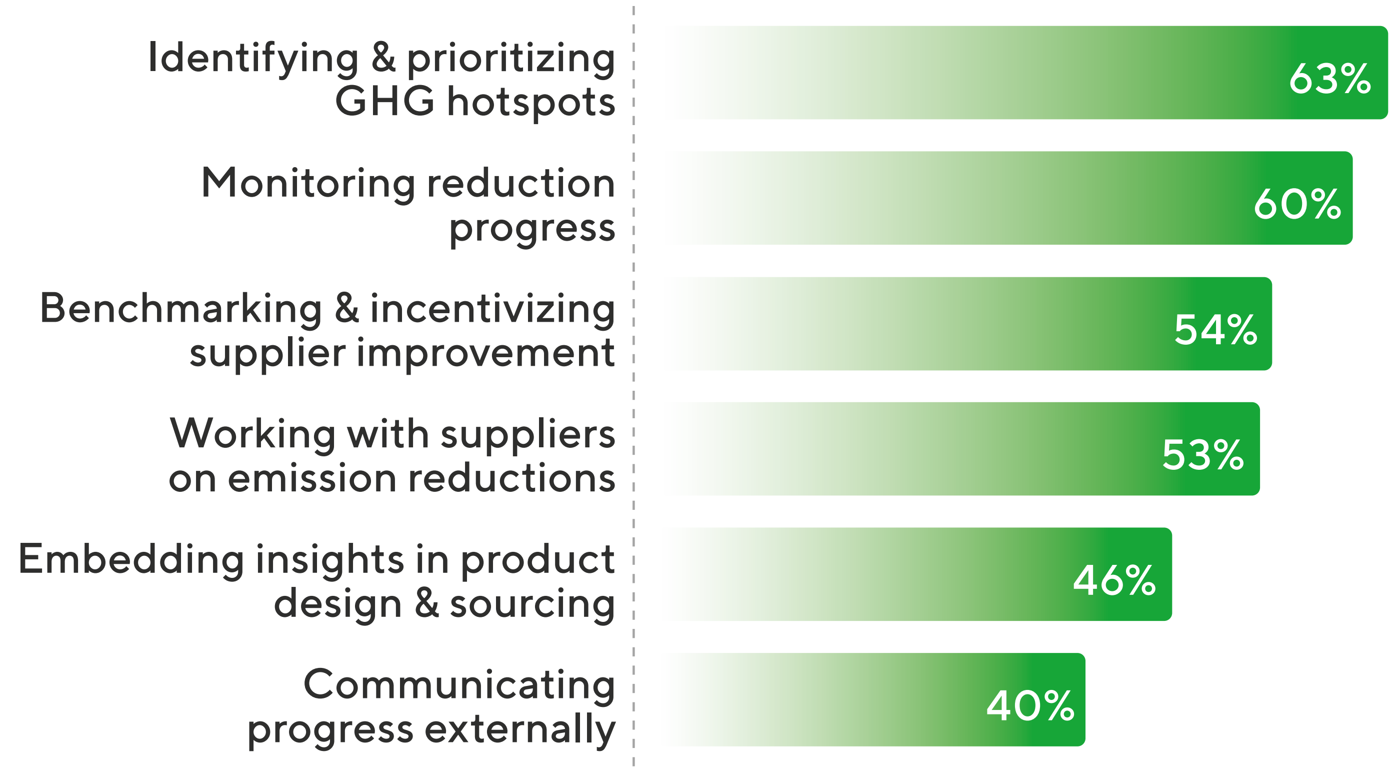
Visibility into supplier sustainability performance at each tier

	Tier 1	Tier 2	Tier 3
0-25% visibility	7% of respondents	37%	85%
25-50% visibility	13% of respondents	51%	14%
50-75% visibility	32% of respondents	12%	1%
75%+ visibility	48% of respondents	0%	0%

Organizations collect a wide range of ESG data from suppliers, but carbon is a primary focus. Nearly all organizations now collect at least some emissions data from suppliers, and many are beginning to generate insights into the carbon footprint of supplier products and materials. These insights are being used to identify emissions hotspots, inform decarbonization strategies, and support procurement decisions related to supplier selection and product design.

How organizations are using Scope 3 data

Percentage of respondents identifying each as a key use



Supplier spotlight: The carbon data gap

Buyers are requesting more granular carbon data from suppliers. However, many suppliers remain in the early stages of their measurement journey. Nearly one-third report providing no emissions data to customers, while others rely primarily on aggregated data. This capability gap continues to limit the availability of decision-grade carbon intelligence across supply networks.

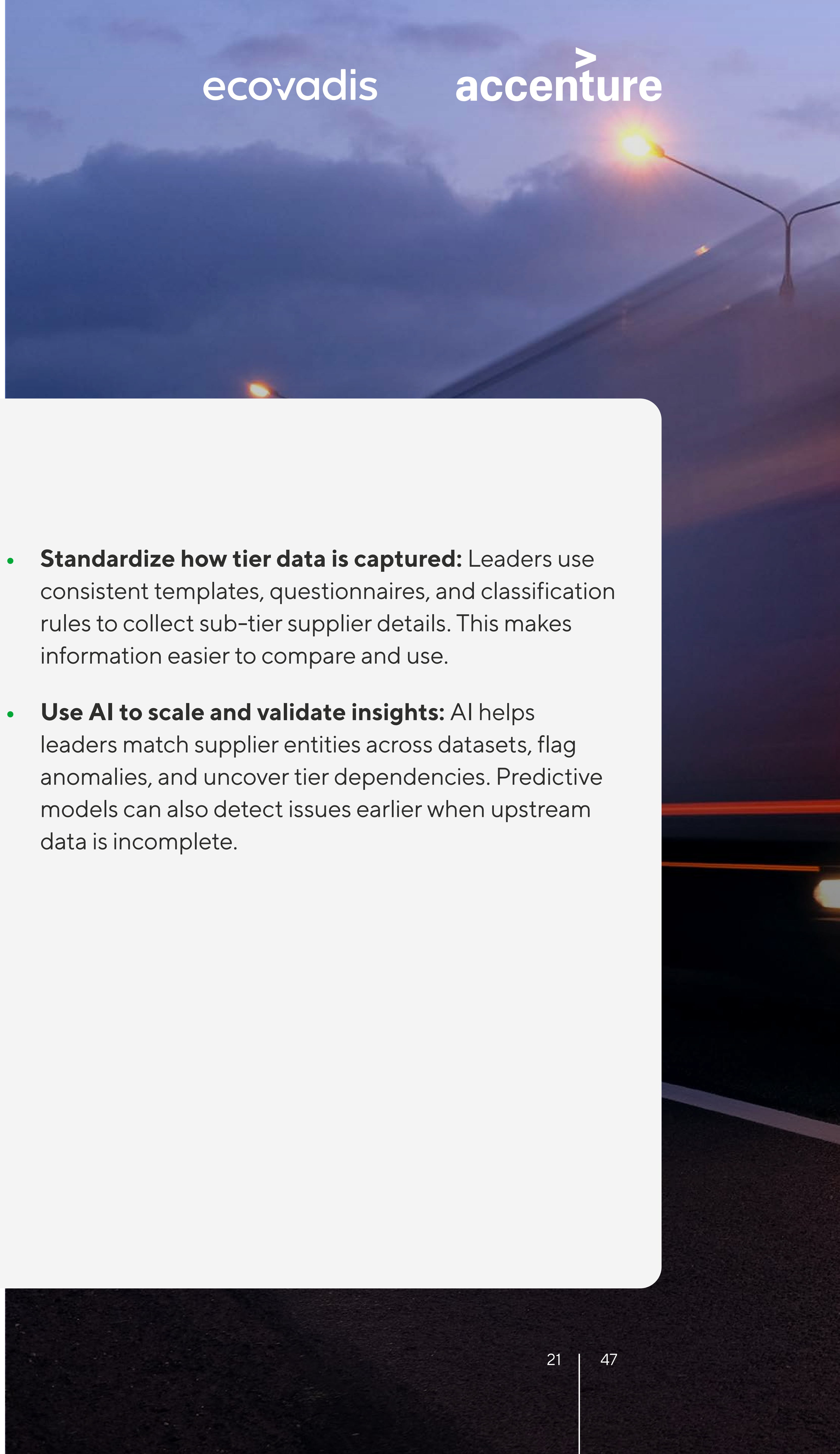
Types of emissions data suppliers provide to customers

30% do not provide any carbon data

26% provide aggregated Scope 1 & 2 data

23% provide estimated carbon data

21% provide Scope 1-2 activity-level data (+ some Scope 3)



Leader insights: From visibility to decision-grade intelligence

Leading organizations treat visibility as a capability multiplier that improves data quality, decision-making, and cross-functional integration.

- **Multi-tier visibility expands what organizations can measure.** Our analysis shows that nearly nine out of ten high-visibility* organizations collect at least some primary emissions data across all three scopes and at the product level. By contrast, those with less visibility report just 56% for both metrics.
- **Two-thirds of leaders now embed carbon insights into key decision-making processes.** While most buyers identify emissions hotspots and benchmark suppliers, leaders go further. 62% integrate carbon insights into product design, sourcing decisions, and customer reporting (vs. 44% of others).
- **AI adoption is closing visibility gaps.** Organizations deploying AI operationally report greater Tier 1 visibility: 82% have insight into more than half of their Tier 1 suppliers, compared with 74% of those with limited AI use. Tier 2 and 3 visibility also increases with AI deployment.

* These organizations report visibility into 75%+ of Tier 1, 25–50% into Tier 2, and 6–25% into Tier 3.

What leaders do differently

Leading procurement teams convert visibility into decision-grade* supplier intelligence through five key steps:

- **Build a visibility stack:** Leaders combine supplier disclosures, risk screening tools, traceability systems, and third-party sustainability ratings to gain a more complete view of supply networks.
- **Make visibility continuous:** Leaders monitor suppliers through dashboards, alerts, and ongoing risk scans rather than periodic data collection exercises.
- **Prioritize risk and opportunity hotspots:** Leaders focus first on where exposure and impact are highest. They use segmentation based on spend, materiality, criticality, and sustainability risk.
- **Standardize how tier data is captured:** Leaders use consistent templates, questionnaires, and classification rules to collect sub-tier supplier details. This makes information easier to compare and use.
- **Use AI to scale and validate insights:** AI helps leaders match supplier entities across datasets, flag anomalies, and uncover tier dependencies. Predictive models can also detect issues earlier when upstream data is incomplete.

* Decision-grade intelligence refers to supplier data that is reliable, granular, and validated enough to support sourcing decisions and supplier engagement strategies.

Integration into procurement decisions

Embed ESG intelligence in digital procurement processes and broader strategy.

Why it matters:

Integration is the next critical step in building an effective sustainable procurement operating system. While organizations now have access to growing volumes of supplier data, this information has limited impact if it is not embedded into procurement decisions that shape sourcing, supplier management, and risk mitigation.

Many organizations still rely on manual processes or siloed workflows, creating gaps between sustainability commitments and purchasing behavior. Leading organizations treat integration as both a digital capability and a governance shift. They embed sustainability criteria directly into supplier qualification, sourcing, contracting, and performance management processes.

By aligning procurement with finance, risk, and sustainability teams, organizations create a shared decision framework that balances cost, resilience, growth, and sustainability.

AI is increasingly supporting this integration by automating repetitive tasks and embedding ESG intelligence directly into buyer workflows.

What the data shows: Integrating ESG intelligence into procurement processes

Organizations now have access to more supplier data than ever before. However, converting this into measurable outcomes requires integrating it into core procurement processes. While integration has accelerated since 2024, most organizations still rely on manual or partially digital methods.

Nearly all organizations are integrating ESG intelligence

In 2024, levels of non-integration remained high across most processes, reaching 47% for supplier relationship management (SRM), 43% for risk management, and 33% for supplier sourcing. Most organizations integrating supplier data were doing so manually. Today, only 2% of organizations across each of the six core processes highlighted below report no integration.

Levels of ESG integration across key procurement processes

Percentage of respondents at each integration level

	No integration	Manual integration	Partial digital	Full digital
Procurement analytics	2%	20%	48%	30%
Risk management	2%	24%	45%	29%
Supplier sourcing	1%	23%	49%	27%
Ops. procurement systems	2%	23%	50%	25%
SRM	1%	24%	51%	24%
Category management	2%	28%	46%	24%

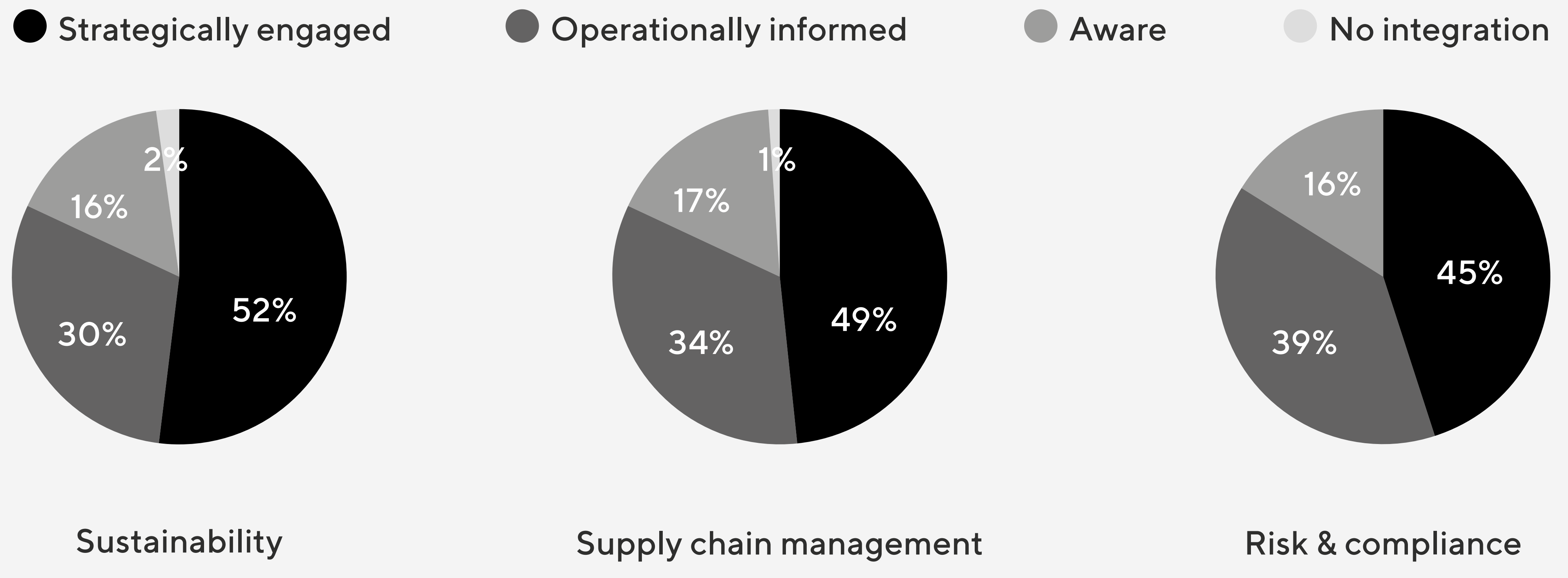
Digital integration is becoming the baseline

Nearly three-quarters of organizations now have at least partial digital ESG integration across six key processes. Full digital integration is highest in procurement analytics (30%) and risk management (29%), reflecting a push toward data maturity and resilience.

Spotlight: Cross-functional integration of sustainable procurement

For most organizations, strategic engagement with sustainable procurement is concentrated across the sustainability, supply chain, and risk and compliance functions. The sustainability function has seen the biggest leap in strategic engagement since 2024, from 30% to 52%, followed closely by risk and compliance. Other functions, including finance, product design, and manufacturing, are becoming better integrated but still remain largely operationally informed or simply "aware," with limited strategic engagement.

Top three functions by level of integration



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Leader insights: From intelligence to operational integration

Integration converts supplier intelligence into measurable impact by embedding actionable insights directly into procurement systems and decision-making processes.

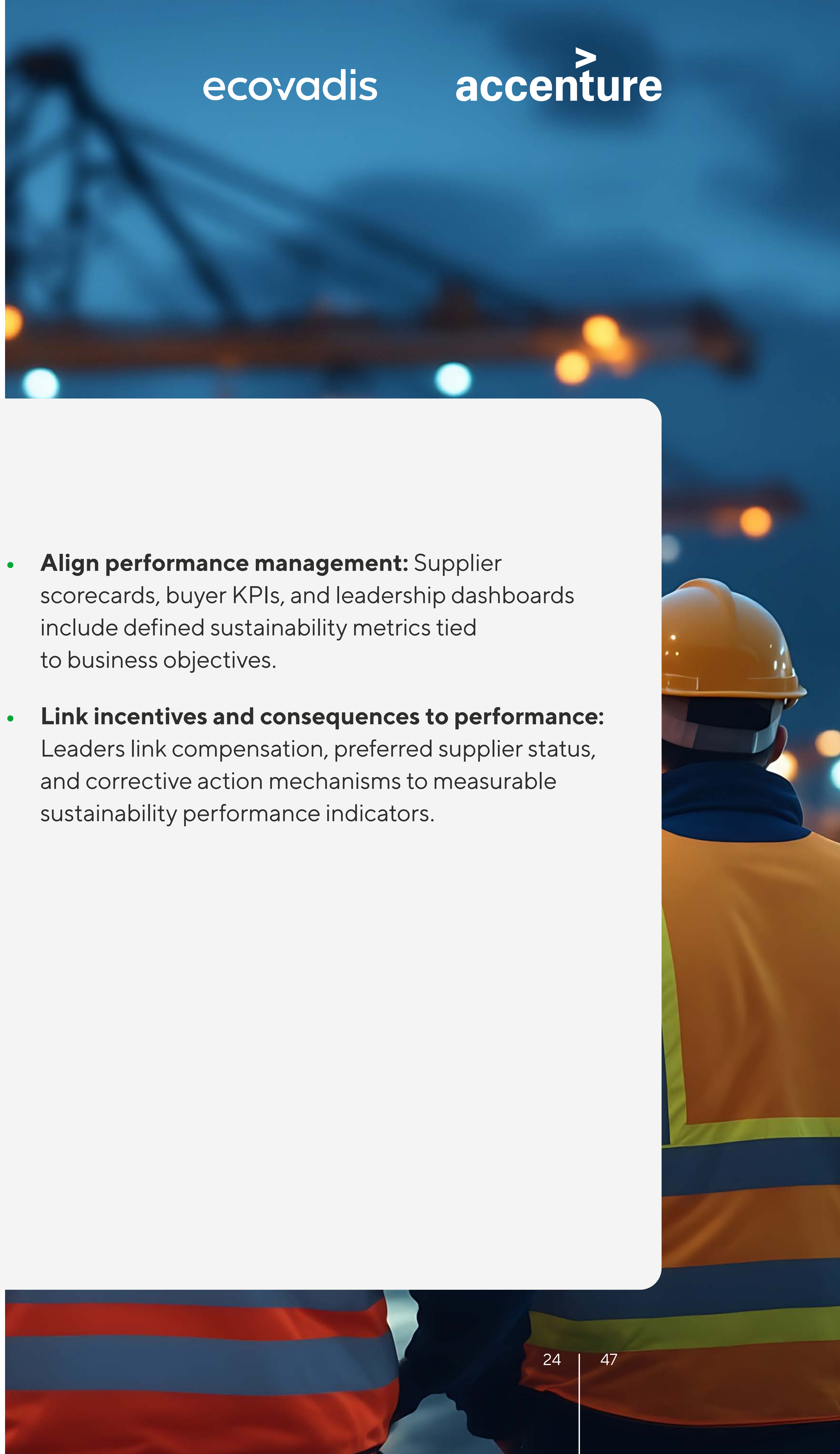
- **High-visibility* organizations are far more likely to operationalize sustainability.** They are 5.9x more likely to have advanced digital integration of sustainability criteria into procurement workflows and 6.6x more likely to have strategically engaged cross-functional teams.
- **Advanced integration is where leaders pull ahead.** Nearly all organizations (98%) have embedded sustainability criteria into procurement in some form, but only 15% report having advanced integration capabilities. This is a critical execution gap leaders are closing.
- **Digital integration and cross-functional ownership reinforce each other.** As workflows become more connected, engagement expands beyond procurement. Teams across finance, risk, sustainability, supply chain operations, and more shift from awareness to shared accountability, aligning sustainability priorities with operational and commercial goals.

* These organizations report visibility into 75%+ of Tier 1, 25–50% into Tier 2, and 6–25% into Tier 3.

What leaders do differently

Leaders are integrating ESG intelligence into procurement operations and decision-making through five key steps:

- **Embed intelligence in decision governance:** Leaders make sustainability criteria mandatory within sourcing approvals, capital requests, and supplier selection decisions.
- **Scale integration across procurement processes:** Leaders align sustainability criteria across category management, contracting, SRM, and risk management to reduce friction between teams and regions.
- **Establish cross-functional accountability:** Leaders create shared responsibility across procurement, finance, risk, and sustainability teams to deliver sustainability outcomes.
- **Align performance management:** Supplier scorecards, buyer KPIs, and leadership dashboards include defined sustainability metrics tied to business objectives.
- **Link incentives and consequences to performance:** Leaders link compensation, preferred supplier status, and corrective action mechanisms to measurable sustainability performance indicators.



Supplier engagement and improvement

Deepen supplier engagement through collaboration, incentivization, capability-building, and co-innovation.

Why it matters:

Supplier engagement is how organizations act on the ESG intelligence they are integrating into procurement processes and decision-making frameworks. It converts data into real-world outcomes by acting on shared supply chain priorities, creating accountability, and targeting support where it will have the most impact.

If done effectively, engagement strengthens supply chain resilience, mitigates sustainability risks, accelerates decarbonization, and builds a pipeline of supplier-driven innovation.

Leading organizations are shifting from passive supplier monitoring to more collaborative partnerships. Moving beyond one-off questionnaires toward structured, continuous engagement enables organizations to convert supplier intelligence into measurable improvements and long-term value creation.

Through supplier segmentation, shared incentives, and targeted capability-building, organizations can bridge the gap between sustainability ambition and operational delivery.

What the data shows: Scaling high-impact engagement

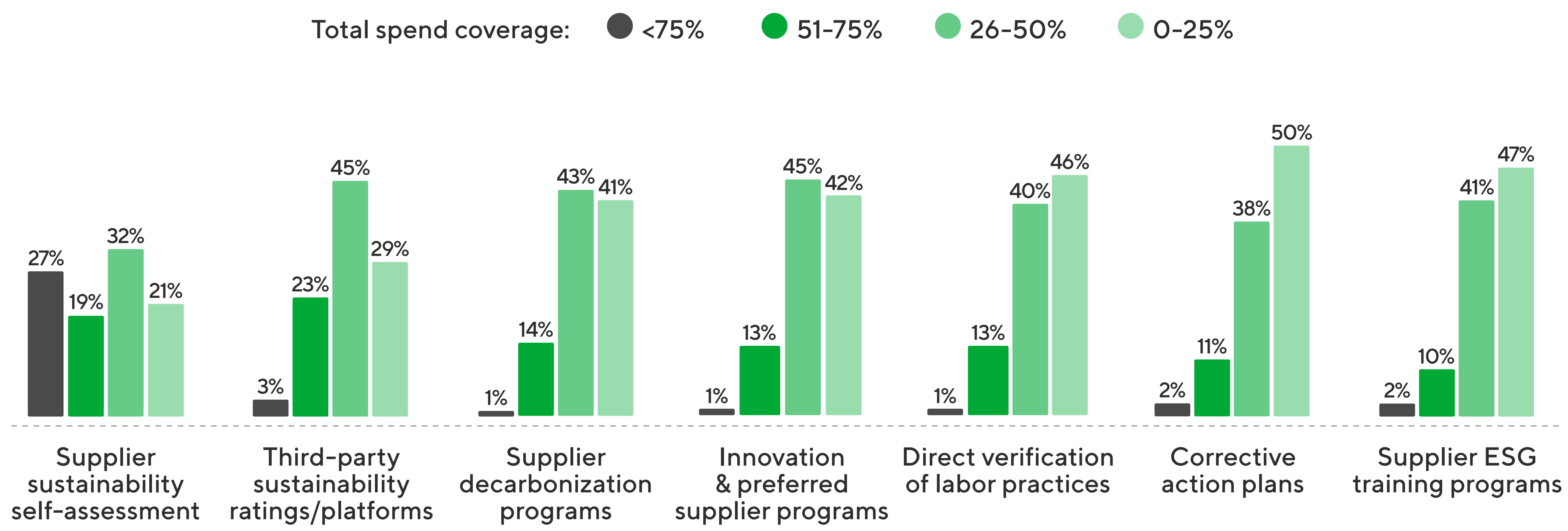
Light-touch engagement methods like SAQs remain the most common, but higher-impact actions are gaining traction: 25% of organizations now use sustainability ratings across at least half of spend.

Scaling high-impact actions is the next strategic imperative

More than a quarter of organizations now cover over 75% of total spend with SAQs. Higher-impact initiatives, like decarbonization programs, supplier training, innovation partnerships, and labor rights verification, still cover less than half of spend for most. Supplier innovation may be rising on the agenda, but only 14% currently extend such programs to more than half of spend.

Supplier engagement actions organizations are deploying across their supply base

Percentage of total spend covered by each engagement action



Engagement priorities vary by supplier type

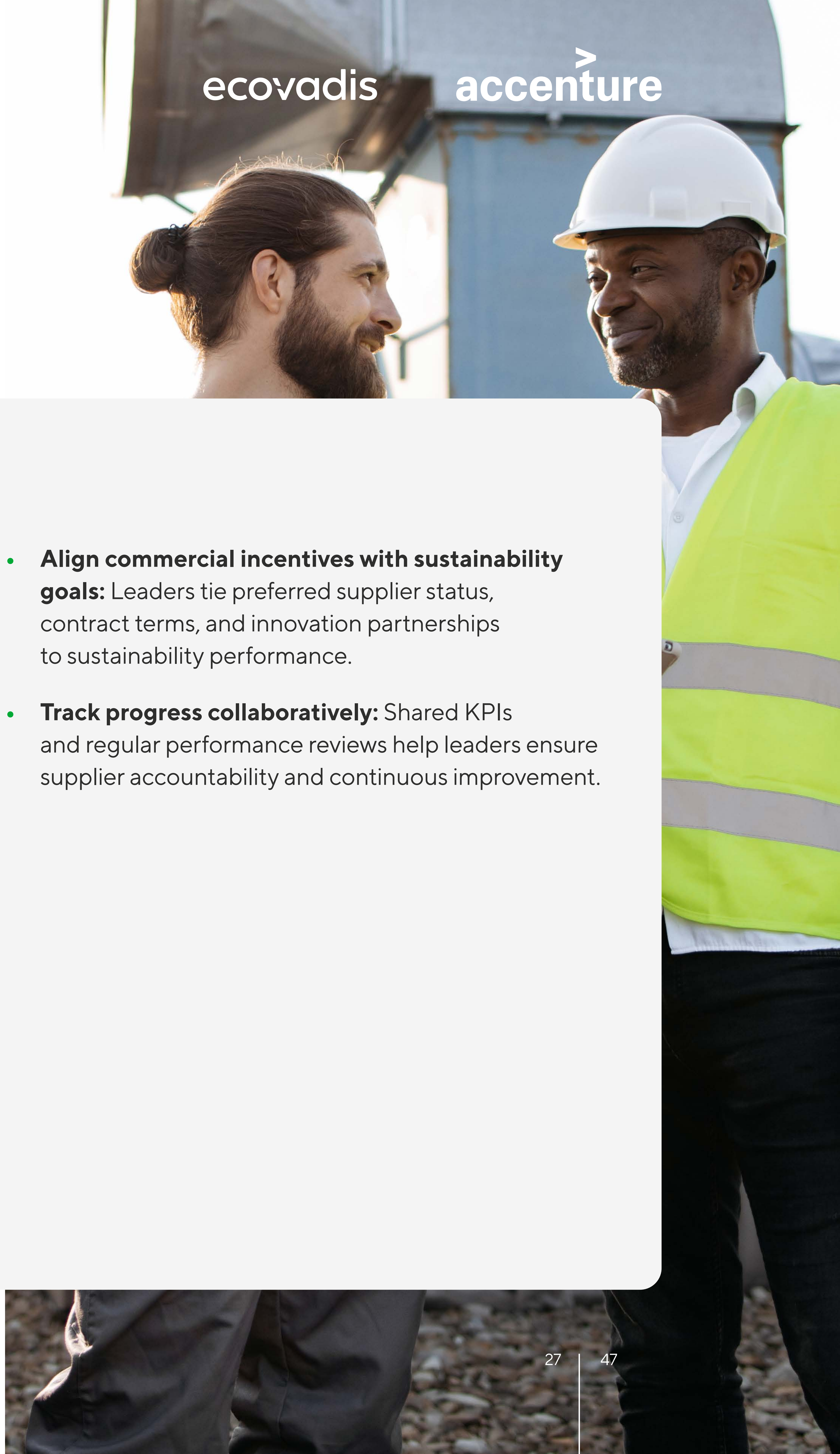
SAQs are deployed across all suppliers at 4.7x the average rate of other actions. Organizations are 1.6x more likely to target strategic suppliers with innovation programs. For high-risk suppliers, decarbonization, labor verification, and corrective action plans are 1.4x more common.

Supplier spotlight: The engagement gap

Although organizations are expanding sustainable procurement initiatives, many suppliers still perceive a gap between customer expectations and support. Only 41% of suppliers report that their customers are highly committed and actively engaged in sustainability. Nearly half (47%) say customers express commitment in principle but provide limited follow-through. Incentives also remain limited. Only 17% of suppliers report feeling incentivized by customer sustainability initiatives, while many say stronger commercial incentives such as long-term contracts or volume commitments would accelerate progress.

How committed are your customers to driving supply chain sustainability?

41%	47%	7%	5%
highly committed & actively engaged	committed in principle	minimally committed or inconsistent	we are the main drivers of sustainability



Leader insights: Turning intelligence into action

Supplier intelligence and procurement integration create the foundation, but targeted supplier engagement is what drives measurable improvement.

- **Stronger intelligence drives deeper supplier engagement.** Our analysis shows that organizations with high sustainability intelligence levels are 3.6x more likely to strategically engage suppliers than other organizations.
- **Leaders move beyond compliance-driven interactions.** While many organizations still rely heavily on self-assessments and periodic audits, leaders scale higher-impact actions — such as supplier training, decarbonization partnerships, and innovation programs — with a focus on the suppliers that matter most.
- **Leaders scale engagement across a greater share of spend.** They are more likely to deploy higher-impact engagement actions across a larger share of their supply base, reflecting a more systemic approach to supply chain transformation.

What leaders do differently

Leading organizations strengthen supplier engagement through five key steps:

- **Prioritize high-impact suppliers:** Leaders focus engagement on suppliers with the greatest risk, spend, and decarbonization potential.
- **Combine expectations with enablement:** Leaders support suppliers through training, tools, and joint improvement plans.
- **Scale engagement through ratings and platforms:** Third-party sustainability ratings and digital platforms enable leaders to gain supplier visibility and streamline performance improvement.
- **Align commercial incentives with sustainability goals:** Leaders tie preferred supplier status, contract terms, and innovation partnerships to sustainability performance.
- **Track progress collaboratively:** Shared KPIs and regular performance reviews help leaders ensure supplier accountability and continuous improvement.

Case study: How AstraZeneca turns supplier ambition into action at scale

AstraZeneca has embedded sustainable procurement as a core business lever, activating suppliers at scale to deliver measurable decarbonization. With coverage spanning ~95% of managed spend and more than 3,500 suppliers, the program moves beyond monitoring to systematically driving supplier improvement.

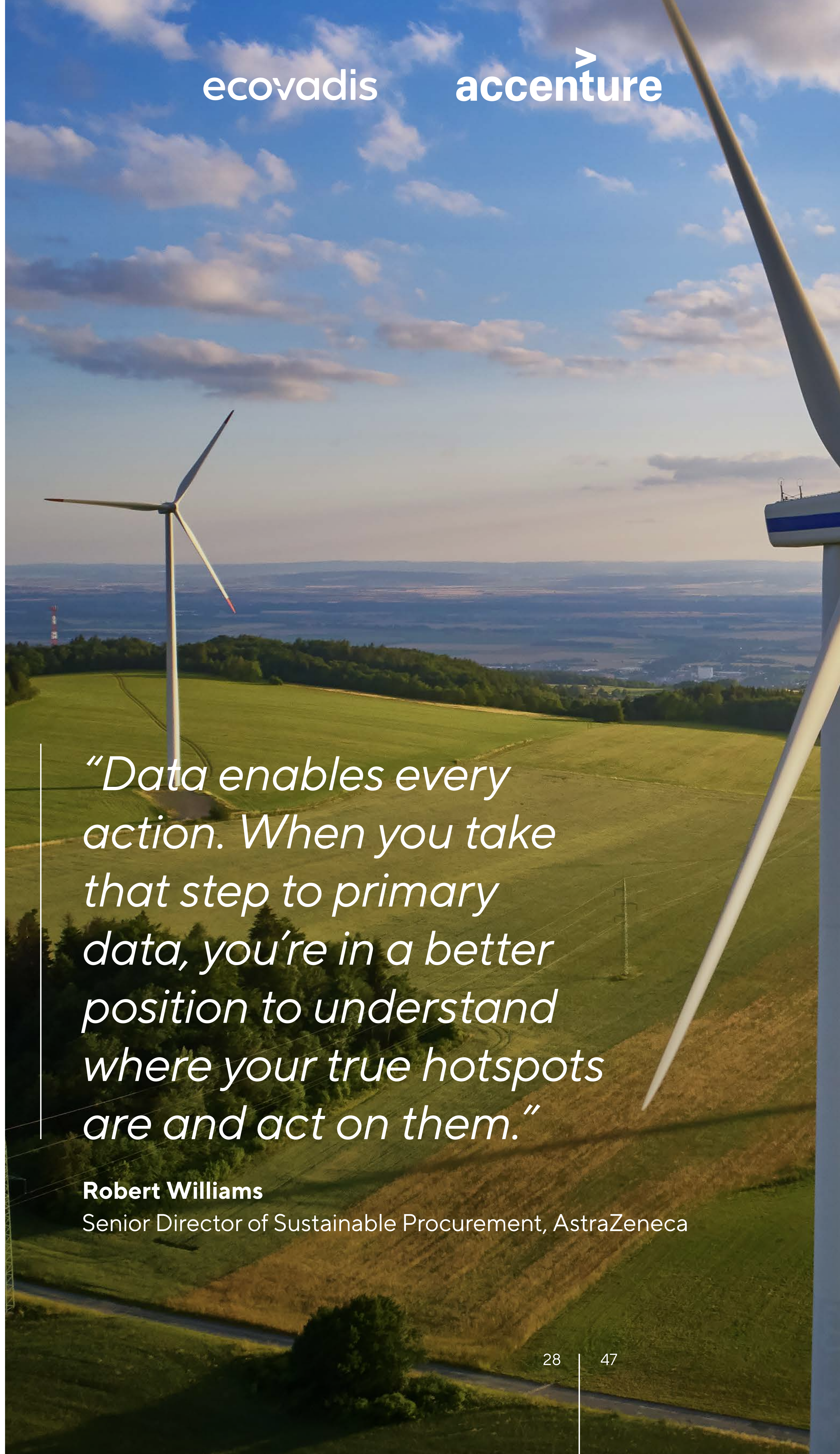
The approach is built on clear expectations and consistent execution. Sustainability requirements are embedded into contracts, sourcing decisions, and supplier performance management, supported by leadership accountability and incentives.

AstraZeneca combines scale with targeted engagement. Over 80% of spend is with suppliers committed to science-based targets, while focused interventions with top-emitting suppliers are accelerating decarbonization where it matters most. SMEs are supported through tailored capability-building programs to enable progress across the full supplier base.

This approach is delivering measurable outcomes, including a 52% reduction in emissions intensity since 2019, alongside improved efficiency through supplier consolidation and reduced reporting burden.

Key insights

- **Embed expectations into procurement:** Contracts, sourcing, and performance management reinforce supplier accountability.
- **Prioritize high-impact suppliers:** More than 80% of spend with SBTi-committed suppliers, with targeted engagement of top emitters.
- **Enable the full supplier base:** Tailored SME support drives broader adoption and impact.



Innovation and value creation

Scale supplier innovation and unlock new value through AI, circularity, and low-carbon products.

Why it matters:

With the right systems in place to collect ESG intelligence, embed it into workflows, and engage suppliers, organizations can move beyond risk and compliance. The next step is driving innovation, both within procurement and across the supply chain, to scale sustainability impact and unlock new sources of value.

Many leading organizations are now focusing on accelerating low-carbon material use, circular product design, and resource efficiency, while embedding carbon intelligence in category strategies and supplier collaboration models.

Leaders make innovation a core value lever by rethinking materials, redesigning products, reconfiguring supplier relationships, and aligning sustainability priorities with commercial growth. They are shifting from monitoring supplier performance to co-developing solutions that reduce emissions, lower total cost of ownership, strengthen resilience, and differentiate offerings in sustainability-driven markets.

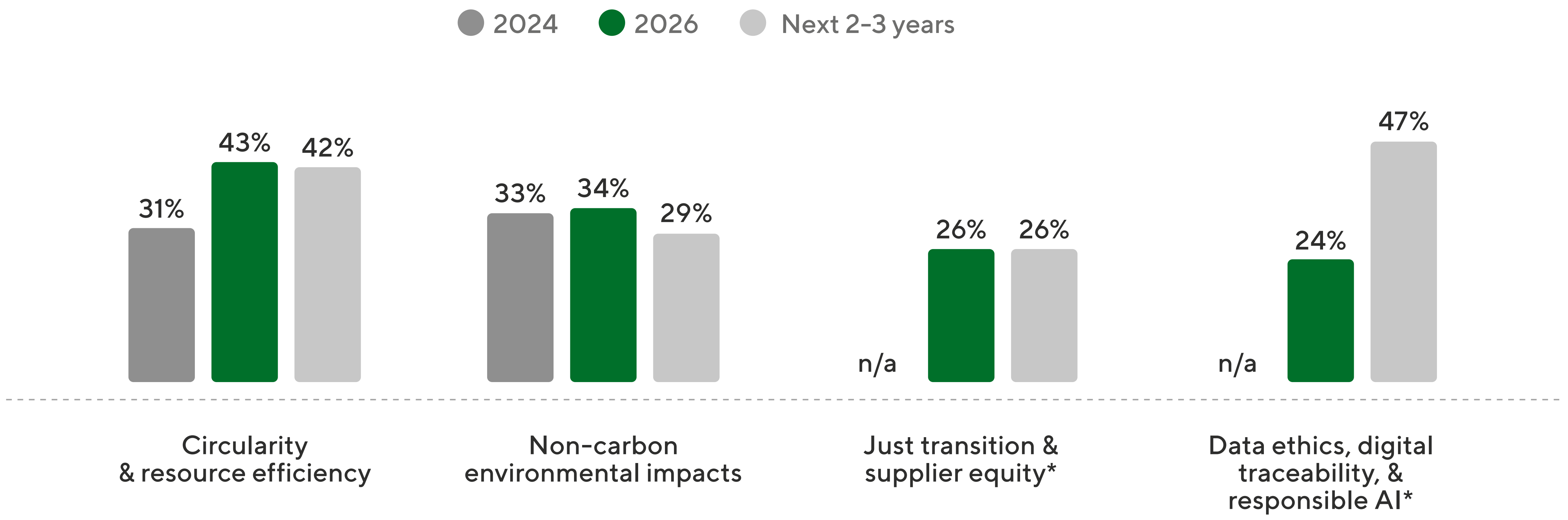
What the data shows: The next value frontiers

While risk management and compliance remain foundational, organizations increasingly see supplier co-innovation as the next frontier of sustainable procurement.

Developing circular products and improving resource efficiency is the leading innovation priority, cited by 43% of respondents. Other emerging areas include biodiversity and nature-positive products, digital traceability, responsible AI, and supplier equity. These areas reflect a shift toward sustainability-driven product and supply chain innovation.

Top innovation areas shaping sustainable procurement strategy

Percentage of respondents reporting each as a top-three priority in 2024, 2026, and over the next 2-3 years



* Sample sizes: 2024 (n=443) and 2026 (n=1,000). The response options "Just transition & supplier equity" and "Data ethics, digital traceability, & responsible AI" were not included in the 2024 survey.

Spotlight: AI is now integral to procurement

The AI boom is accelerating this shift. Nearly half (47%) of buyers expect digital traceability and responsible AI to be a top focus over the next two to three years, up from 24% today. Innovation-led supplier engagement is also moving into the mainstream.

AI adoption is accelerating across procurement functions. More than 55% of buyers report operational use of AI, while 13% report widespread deployment across procurement workflows. About a third remain in the limited-use or experimentation phase, while only 2% report no current use.

Top three AI implementation areas in 2026

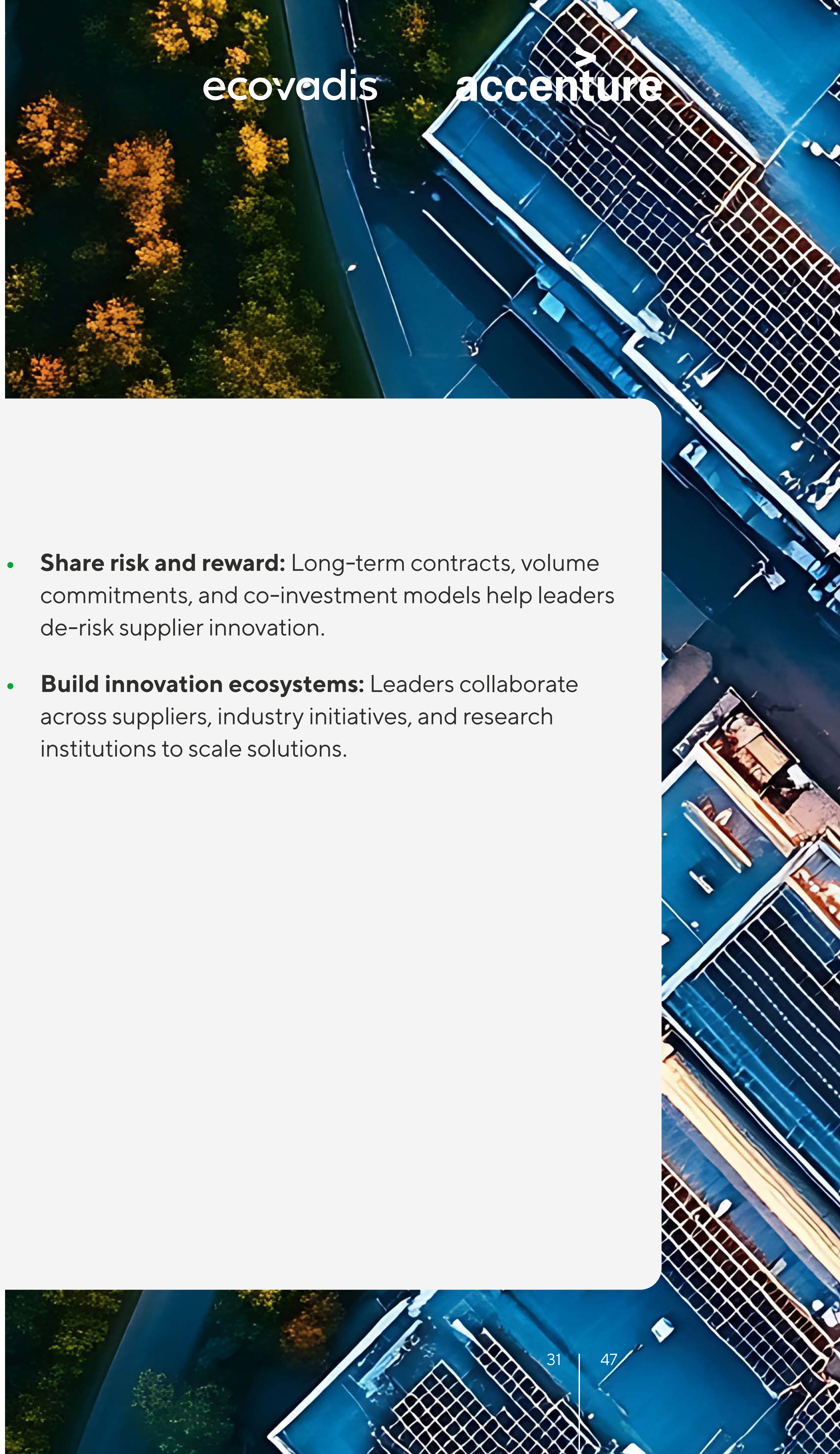
72% predictive analytics

64% supplier risk screening

62% carbon data validation

Suppliers are still in the early stages of AI adoption

Supplier adoption, however, lags significantly. Just 5% of suppliers report extensive use of AI or predictive analytics. Most (60%) use AI in a limited way or plan to deploy it within two years. This digital asymmetry contributes to ongoing data quality challenges and limits the ability of buyers to gain decision-grade supplier intelligence.



Leader insights: Innovation is a value multiplier

Innovation is becoming a defining capability of sustainable procurement leaders.

- **Risk and compliance remain foundational,** but leaders are prioritizing value creation through circular products, resource efficiency, and supplier-driven innovation.
- **Innovation programs are expanding rapidly.** Today, 58% of organizations run innovation initiatives across 26–75% of supplier spend, compared with just 9% in 2024.
- **The value case is evolving beyond risk mitigation toward growth and product differentiation.** Leading organizations are shifting from simply monitoring supplier performance to co-developing new materials, technologies, and business models with their suppliers.

What leaders do differently

Leading organizations are scaling supplier-driven innovation through five key steps:

- **Identify innovation hotspots:** Leaders use Scope 3 data, lifecycle analysis, and predictive analytics to identify materials and processes with the highest impact.
- **Co-develop solutions with suppliers:** Leaders establish structured innovation partnerships, including joint decarbonization roadmaps and R&D initiatives.
- **Align innovation with business strategy:** Sustainability-driven innovation is embedded in category strategies and product development pipelines.
- **Share risk and reward:** Long-term contracts, volume commitments, and co-investment models help leaders de-risk supplier innovation.
- **Build innovation ecosystems:** Leaders collaborate across suppliers, industry initiatives, and research institutions to scale solutions.

Outlook and Next Steps

How leaders will differentiate themselves in the near term

Sustainable procurement is evolving beyond simply managing the sustainability challenges currently shaping the risk and compliance landscape. Over the next two to three years, leaders will shift toward building more holistic, integrated programs underpinned by high-quality supplier intelligence and strong governance structures.

With most large organizations already setting targets, the next phase of sustainable procurement will be defined by execution.

As sustainable procurement matures, the business case is rebalancing from compliance toward value creation. While managing sustainability risk and resilience remains foundational, net-zero delivery has emerged as the dominant strategic driver, closely followed by supplier innovation and transformation.

Success in this next phase will depend on embedding sustainability into sourcing strategies, category management, and supplier relationships, ensuring that targets translate into measurable operational and financial impact.

Beyond core sustainability topics, tomorrow's leaders will prioritize unlocking supply chain value through net-zero delivery, circularity, and AI deployment.

Scope 3 carbon management will remain a central priority over the next two to three years, with 55% of organizations placing it among their top-three focus areas.

This reflects the growing cost of climate inaction, including physical disruption risks, regulatory pressure, and reputational exposure.

Protecting value remains critical, but leaders are recognizing that Scope 3 action can also deliver strong ROI — often 3–6x returns on emissions-reduction efforts across the supply chain. Circular business models offer additional upside, improving resilience to resource constraints and opening access to new markets worth up to $4.5 trillion by 2030.

As compliance becomes baseline across markets, regions are increasingly differentiated by how they deliver on goals.

While sustainable procurement priorities are converging globally around carbon outcomes and supply-base innovation, execution paths are diverging by industry and region. Asset-intensive sectors such as manufacturing, energy, and construction face acute pressure to decarbonize complex upstream supply chains, while consumer-facing industries balance emissions reduction with circularity and responsible sourcing expectations.

Regionally, the Americas are pivoting the fastest toward delivery and measurable impact, EMEA is advancing through structured decarbonization under strong regulatory frameworks, and APAC is more closely integrating sustainability with growth, talent, and partnership-led strategies.

Over the next two to three years, effective AI deployment will be a key differentiator separating leaders from the pack.

AI is emerging as a clear differentiator of sustainable procurement maturity. For procurement teams, generative AI enables faster, better-informed decision-making, stronger resilience, improved sustainability outcomes, and lower operating effort. This is achieved by streamlining workflows across compliant buying, supplier management, category intelligence, and risk monitoring.

Agentic AI builds on this foundation by coordinating actions across those workflows within governance frameworks, accelerating execution across sustainability priorities. As execution becomes the defining challenge, effective AI deployment will be critical to converting ambition into measurable value at scale.

Regional Trends

This section presents a regional view of the buyer survey findings, drawing on responses from the Americas (35% of the total), Europe and the Middle East (33%), and Asia-Pacific (32%) to show how programs compare across major markets. The tables summarize core indicators such as program maturity, leading focus areas, reported value, visibility into suppliers, ESG integration, supplier engagement, carbon data collection, and operational AI use.

It also provides a regional snapshot of supplier responses across five key indicators. For the supplier survey, 65% of respondents were in Europe and the Middle East, 18% in Asia-Pacific, and 17% in the Americas.

Buyer survey: The Americas

	Program maturity		Top focus area		Key program pillars: ROI	Visibility	Integration	Supplier engagement	Carbon	AI use
	Percentage of programs running for 10+ years	Percentage of programs with a fully dedicated sustainable procurement team	Top program focus area (percentage citing it as a top-three driver)	Expected top program focus area over the next 2–3 years	Top three program benefits (percentage citing each as a benefit)	Percentage of programs with visibility into 75%+ of Tier 1 suppliers	Average level of full digital ESG integration across key procurement processes	Percentage of programs covering at least 50% of spend with ESG ratings/platforms	Percentage of programs collecting product carbon footprint data	Percentage of programs with operational AI use or widespread deployment
Survey average	25%	55%	Net-zero & carbon management (54%)	Net-zero & carbon management (55%)	1. Regulatory preparedness (69%) 2. Risk reduction (62%) 3. Innovation outcomes (57%)	48%	27%	26%	67%	Operational tools: 55% Widespread use: 13%
US 220 respondents	28%	66%	Net-zero & carbon management (55%)	Net-zero & carbon management (62%)	1. Regulatory preparedness (66%) 2. Innovation outcomes (62%) 3. Risk reduction (58%)	52%	31%	31%	67%	Operational tools: 57% Widespread use: 18%
Canada 50 respondents	26%	38%	Net-zero & carbon management (58%)	Net-zero & carbon management (58%)	1. Regulatory preparedness (72%) 2. Risk reduction (60%) 3. Innovation outcomes (58%)	44%	27%	32%	70%	Operational tools: 54% Widespread use: 12%
Brazil 40 respondents	18%	43%	Ethical governance & business integrity (50%)	Net-zero & carbon management (73%)	1. Regulatory preparedness (73%) 2. Innovation outcomes (63%) 3. Risk reduction (55%)	33%	15%	10%	48%	Operational tools: 43% Widespread use: 3%
Mexico 40 respondents	15%	45%	Net-zero & carbon management (43%) / ESG regulatory compliance (43%) / Non-carbon environmental impacts (43%)	Circularity and resource efficiency (50%)	1. Regulatory preparedness (78%) 2. Risk reduction (65%) 3. Cost savings (43%)	33%	16%	10%	58%	Operational tools: 45% Widespread use: 10%

Buyer survey: Asia-Pacific

	Program maturity		Top focus area		Key program pillars: ROI	Visibility	Integration	Supplier engagement	Carbon	AI use
	Percentage of programs running for 10+ years	Percentage of programs with a fully dedicated sustainable procurement team	Top program focus area (percentage citing it as a top-three driver)	Expected top program focus area over the next 2–3 years	Top three program benefits (percentage citing each as a benefit)	Percentage of programs with visibility into 75%+ of Tier 1 suppliers	Average level of full digital ESG integration across key procurement processes	Percentage of programs covering at least 50% of spend with ESG ratings/platforms	Percentage of programs collecting product carbon footprint data	Percentage of programs with operational AI use or widespread deployment
China 80 respondents	16%	51%	Net-zero & carbon management (49%)	Net-zero & carbon management (54%)	1. Risk reduction (76%) 2. Regulatory preparedness (74%) 3. Perceived change in brand perception (56%)	58%	24%	21%	71%	Operational tools: 51% Widespread use: 10%
India 80 respondents	19%	36%	Supplier workforce & labor practices (50%)	Net-zero & carbon management (53%)	1. Regulatory preparedness (73%) 2. Risk reduction (58%) 3. Cost savings (48%)	45%	16%	15%	60%	Operational tools: 35% Widespread use: 6%
Japan 60 respondents	35%	60%	Net-zero & carbon management (53%) / Supplier workforce & labor practices (53%)	Net-zero & carbon management (62%)	1. Risk reduction (73%) 2. Regulatory preparedness (63%) 3. Innovation outcomes (57%)	55%	32%	25%	65%	Operational tools: 62% Widespread use: 13%
Australia 60 respondents	22%	62%	Net-zero & carbon management (52%)	Data ethics, digital traceability & responsible AI (57%)	1. Regulatory preparedness (67%) 2. Risk reduction (65%) 3. Innovation outcomes (62%)	53%	33%	28%	80%	Operational tools: 62% Widespread use: 12%

Buyer survey: Europe and the Middle East

	Program maturity		Top focus area		Key program pillars: ROI	Visibility	Integration	Supplier engagement	Carbon	AI use
	Percentage of programs running for 10+ years	Percentage of programs with a fully dedicated sustainable procurement team	Top program focus area (percentage citing it as a top-three driver)	Expected top program focus area over the next 2–3 years	Top three program benefits (percentage citing each as a benefit)	Percentage of programs with visibility into 75%+ of Tier 1 suppliers	Average level of full digital ESG integration across key procurement processes	Percentage of programs covering at least 50% of spend with ESG ratings/platforms	Percentage of programs collecting product carbon footprint data	Percentage of programs with operational AI use or widespread deployment
Germany 60 respondents	30%	62%	Net-zero & carbon management (68%)	Net-zero & carbon management (52%)	1. Innovation outcomes (68%) 2. Regulatory preparedness (65%) 3. Cost savings (55%)	58%	31%	35%	78%	Operational tools: 63% Widespread use: 10%
UK 60 respondents	32%	58%	Net-zero & carbon management (68%)	Net-zero & carbon management (53%)	1. Regulatory preparedness (70%) 2. Risk reduction (65%) 3. Innovation outcomes (62%)	55%	35%	37%	73%	Operational tools: 68% Widespread use: 8%
France 50 respondents	36%	68%	Net-zero & carbon management (54%) / Supplier workforce & labor practices (54%)	Net-zero & carbon management (60%)	1. Regulatory preparedness (72%) 2. Innovation outcomes (62%) 3. Risk reduction (60%)	60%	32%	32%	76%	Operational tools: 62% Widespread use: 12%
Italy 35 respondents	17%	60%	Net-zero & carbon management (60%) / Circularity & resource efficiency (60%)	Net-zero & carbon management (49%) / Data ethics, digital traceability & responsible AI (49%)	1. Innovation outcomes (66%) 2. Regulatory preparedness (60%) 3. Risk reduction (54%)	57%	28%	31%	69%	Operational tools: 60% Widespread use: 11%
Spain 35 respondents	17%	54%	Net-zero & carbon management (51%) / Circularity & resource efficiency (51%)	Net-zero & carbon management (49%)	1. Regulatory preparedness (74%) 2. Perceived change in brand perception (66%) 3. Risk reduction (54%)	23%	19%	20%	54%	Operational tools: 54% Widespread use: 14%
UAE 25 respondents	4%	36%	Net-zero & carbon management (56%)	Circularity & resource efficiency (56%)	1. Perceived change in brand perception (72%) 2. Risk reduction (68%) 3. Regulatory preparedness (64%)	24%	22%	20%	48%	Operational tools: 40% Widespread use: 16%

Supplier survey: The Americas

	Program maturity	Top benefit	Customer commitment	Emissions data	AI adoption
	Primary motivation for engaging in sustainability (percentage of respondents citing it as a top driver)	Top benefit respondents report from their sustainability efforts (percentage citing it as a top-three benefit)	Percentage of respondents saying their large customers are highly committed to supply chain sustainability	Percentage of respondents that provide primary emissions data versus no carbon data	Percentage of respondents who are currently using AI (either extensively or in a limited capacity), planning to adopt it within the next 2–3 years, or have no plans to adopt it
Survey average	Purpose & ethical reasons (36%)	Improved relationships & collaboration with customers (62%)	41%	Provide primary emissions data: 21% Provide no data: 30%	Currently use: 32% Plan to use: 33% No plans to adopt: 36%
US 147 respondents	Protecting existing business (35%)	Improved relationships & collaboration with customers (56%)	32%	Provide primary emissions data: 23% Provide no data: 27%	Currently use: 27% Plan to use: 28% No plans to adopt: 45%
Brazil 88 respondents	Purpose & ethical reasons (58%)	Strengthened reputation and brand recognition (67%)	53%	Provide primary emissions data: 11% Provide no data: 39%	Currently use: 28% Plan to use: 44% No plans to adopt: 27%
Mexico 53 respondents	Purpose & ethical reasons (45%)	Improved relationships & collaboration with customers (64%)	43%	Provide primary emissions data: 8% Provide no data: 42%	Currently use: 13% Plan to use: 45% No plans to adopt: 42%

Supplier survey: Asia-Pacific

	Primary motivation	Top benefit	Customer commitment	Emissions data	AI adoption
	Primary motivation for engaging in sustainability (percentage of respondents citing it as a top driver)	Top benefit respondents report from their sustainability efforts (percentage citing it as a top-three benefit)	Percentage of respondents saying their large customers are highly committed to supply chain sustainability	Percentage of respondents that provide primary emissions data versus no carbon data	Percentage of respondents who are currently using AI (either extensively or in a limited capacity), planning to adopt it within the next 2–3 years, or have no plans to adopt it
China 91 respondents	Revenue & growth (49%)	Improved relationships & collaboration with customers (64%)	69%	Provide primary emissions data: 12% Provide no data: 33%	Currently use: 48% Plan to use: 30% No plans to adopt: 22%
India 67 respondents	Purpose & ethical reasons (57%)	Improved relationships & collaboration with customers (72%)	55%	Provide primary emissions data: 22% Provide no data: 18%	Currently use: 44% Plan to use: 40% No plans to adopt: 16%
Japan 48 respondents	Revenue & growth (29%) / Protecting existing business (29%)	Enhanced compliance & risk management (67%) / Improved relationships & collaboration with customers (67%)	35%	Provide primary emissions data: 10% Provide no data: 25%	Currently use: 27% Plan to use: 25% No plans to adopt: 48%

Supplier survey: Europe and the Middle East

	Primary motivation	Top benefit	Customer commitment	Emissions data	AI adoption
	Primary motivation for engaging in sustainability (percentage of respondents citing it as a top driver)	Top benefit respondents report from their sustainability efforts (percentage citing it as a top-three benefit)	Percentage of respondents saying their large customers are highly committed to supply chain sustainability	Percentage of respondents that provide primary emissions data versus no carbon data	Percentage of respondents who are currently using AI (either extensively or in a limited capacity), planning to adopt it within the next 2–3 years, or have no plans to adopt it
Germany 158 respondents	Purpose & ethical reasons (32%)	Improved relationships & collaboration with customers (58%)	30%	Provide primary emissions data: 30% Provide no data: 31%	Currently use: 31% Plan to use: 35% No plans to adopt: 34%
UK 88 respondents	Purpose & ethical reasons (43%)	Enhanced compliance & risk management (68%)	32%	Provide primary emissions data: 28% Provide no data: 17%	Currently use: 24% Plan to use: 37% No plans to adopt: 39%
France 110 respondents	Purpose & ethical reasons (35%) / Protecting existing business (35%)	Strengthened reputation & brand recognition (70%)	38%	Provide primary emissions data: 21% Provide no data: 28%	Currently use: 28% Plan to use: 26% No plans to adopt: 46%
Italy 266 respondents	Purpose & ethical reasons (41%)	Improved relationships & collaboration with customers (58%)	39%	Provide primary emissions data: 22% Provide no data: 34%	Currently use: 25% Plan to use: 34% No plans to adopt: 41%
Spain 121 respondents	Purpose & ethical reasons (46%)	Improved relationships & collaboration with customers (68%)	43%	Provide primary emissions data: 25% Provide no data: 25%	Currently use: 30% Plan to use: 31% No plans to adopt: 39%
Sweden 47 respondents	Revenue & growth (34%)	Enhanced compliance & risk management (62%)	28%	Provide primary emissions data: 21% Provide no data: 26%	Currently use: 38% Plan to use: 26% No plans to adopt: 36%

Methodology and Contributors

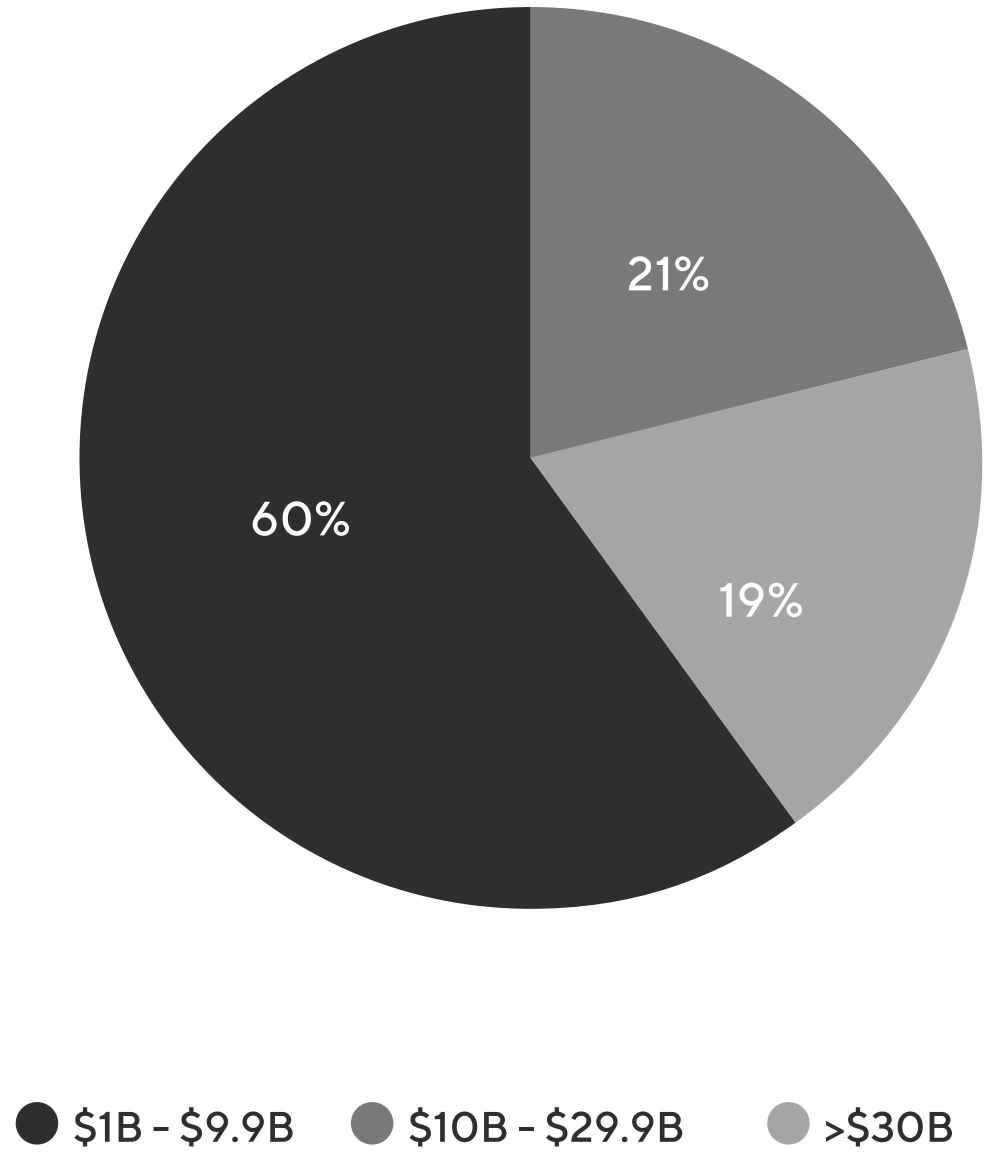
Buyer survey respondents

The buyer survey, conducted in October and November of 2025, gathered responses from 1,000 multinational organizations with more than $1 billion in annual revenue, representing 20 industries and a balanced geographic distribution across the Americas, EMEA, and APAC. Respondents included executives and senior leaders across procurement, sustainability, risk and compliance, and other functions. Together, their responses provide a global view of how sustainable procurement priorities, capabilities, and investment are evolving in large organizations.

Distribution by industry

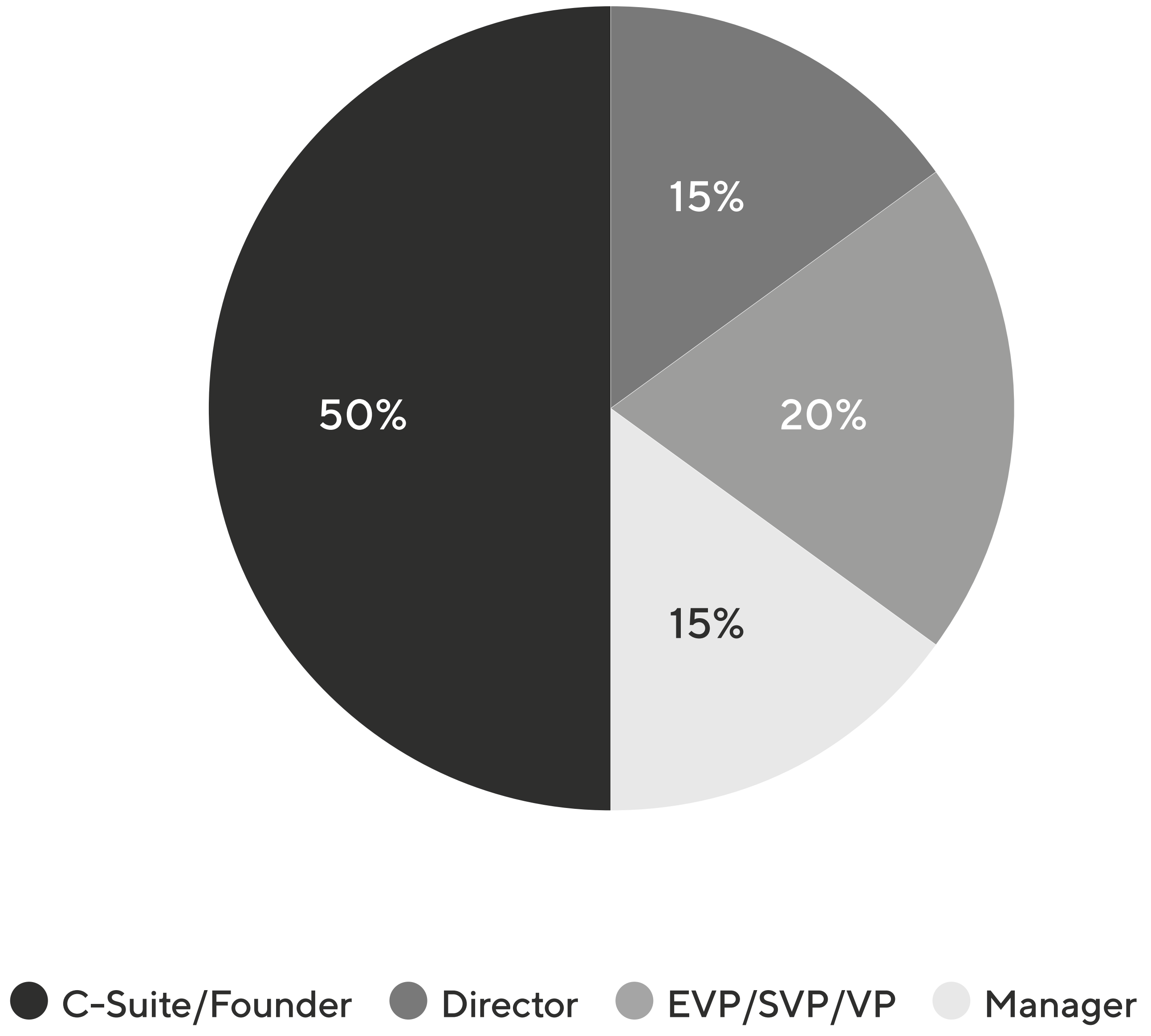
Industry	Count
Consumer Goods & Services	100
Technology	80
Retail	80
Automotive	75
Chemicals	75
Oil & Gas / Energy	70
Aerospace & Defense	40
Communications & Media	40
Financial Services	40
Life Sciences: Medical Technology	40
Life Sciences: Pharmaceuticals	40
Metals & Mining	40
Paper, Packaging, & Fiber Products	40
Professional Services	40
Public Services	40
Travel	40
Utilities	40
Transportation & Logistics	30
Construction & Engineering	25
Industrials	25

Distribution by revenue



Annual revenue

Distribution by job role



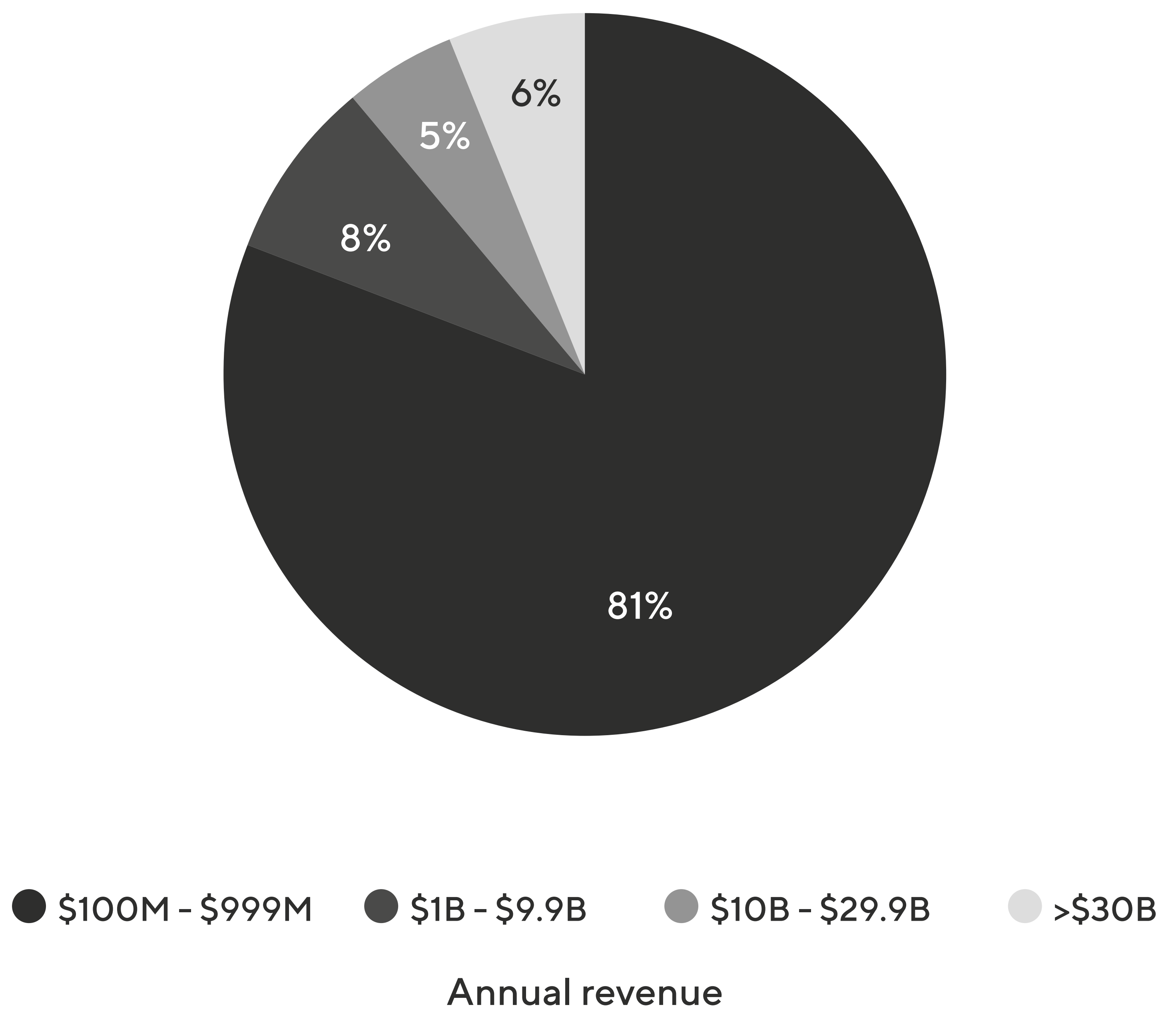
Supplier survey respondents

The supplier survey, conducted in late 2025, collected responses from nearly 2,000 suppliers across global supply chains, representing a wide range of industries and company sizes. About two-thirds of respondents were based in Europe and the Middle East, with substantial representation from other regions as well. The survey offers a supplier-side perspective on how organizations are responding to rising customer expectations around sustainability, including data reporting, digital capabilities, engagement, and performance improvement.

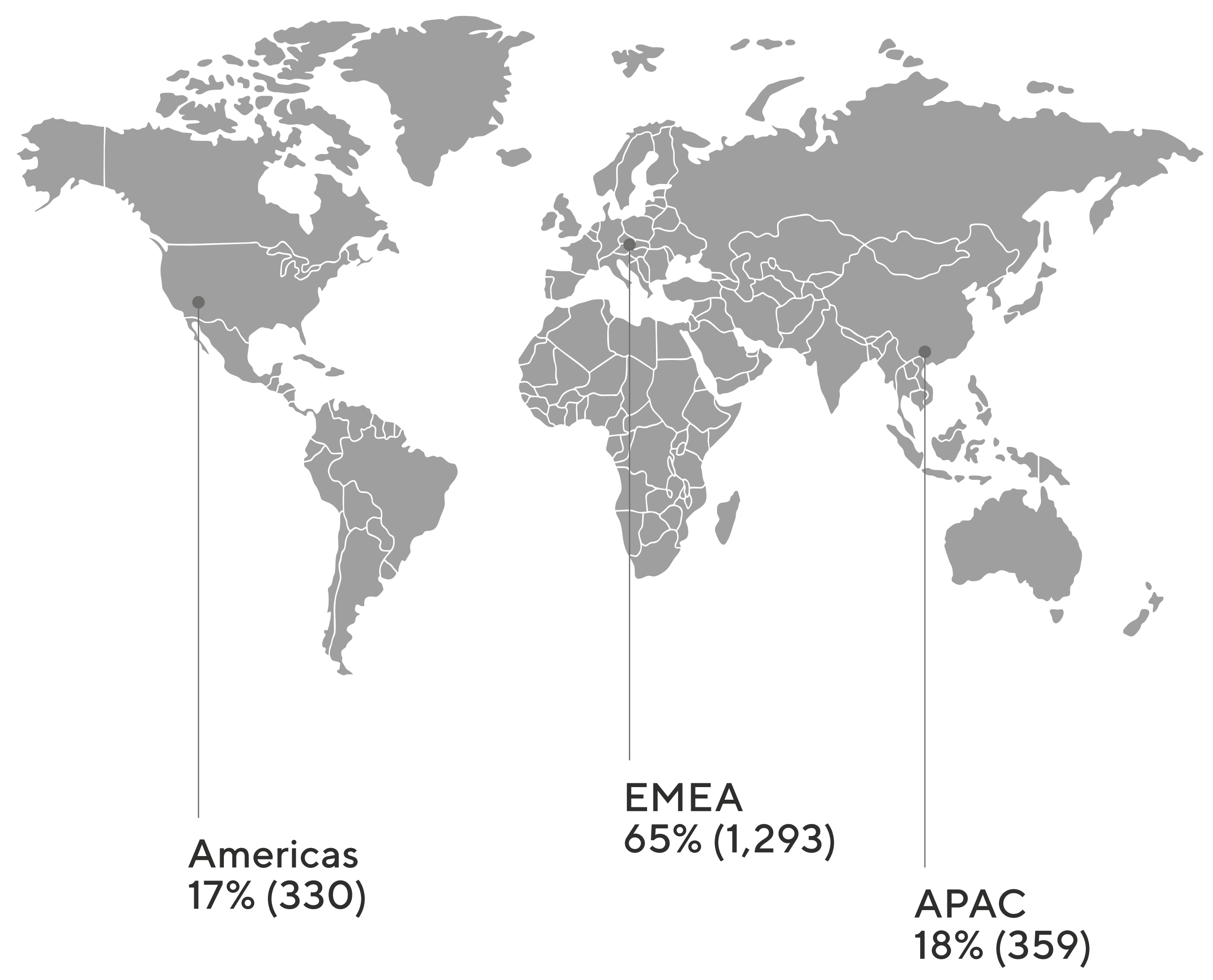
Distribution by industry

Industry	Count
Aerospace & Defense	22
Automotive	140
Chemicals	190
Communications & Media	52
Construction & Engineering	215
Consumer Goods & Services	311
High Tech	128
Industrials	239
Life Sciences: Medical Technology	33
Life Sciences: Pharmaceuticals	59
Metals & Mining	53
Oil & Gas / Energy	35
Packaging, Paper, & Fiber	108
Professional Services	111
Retail	47
Transportation & Logistics	137
Utilities	17
Other	85

Distribution by revenue



Distribution by region

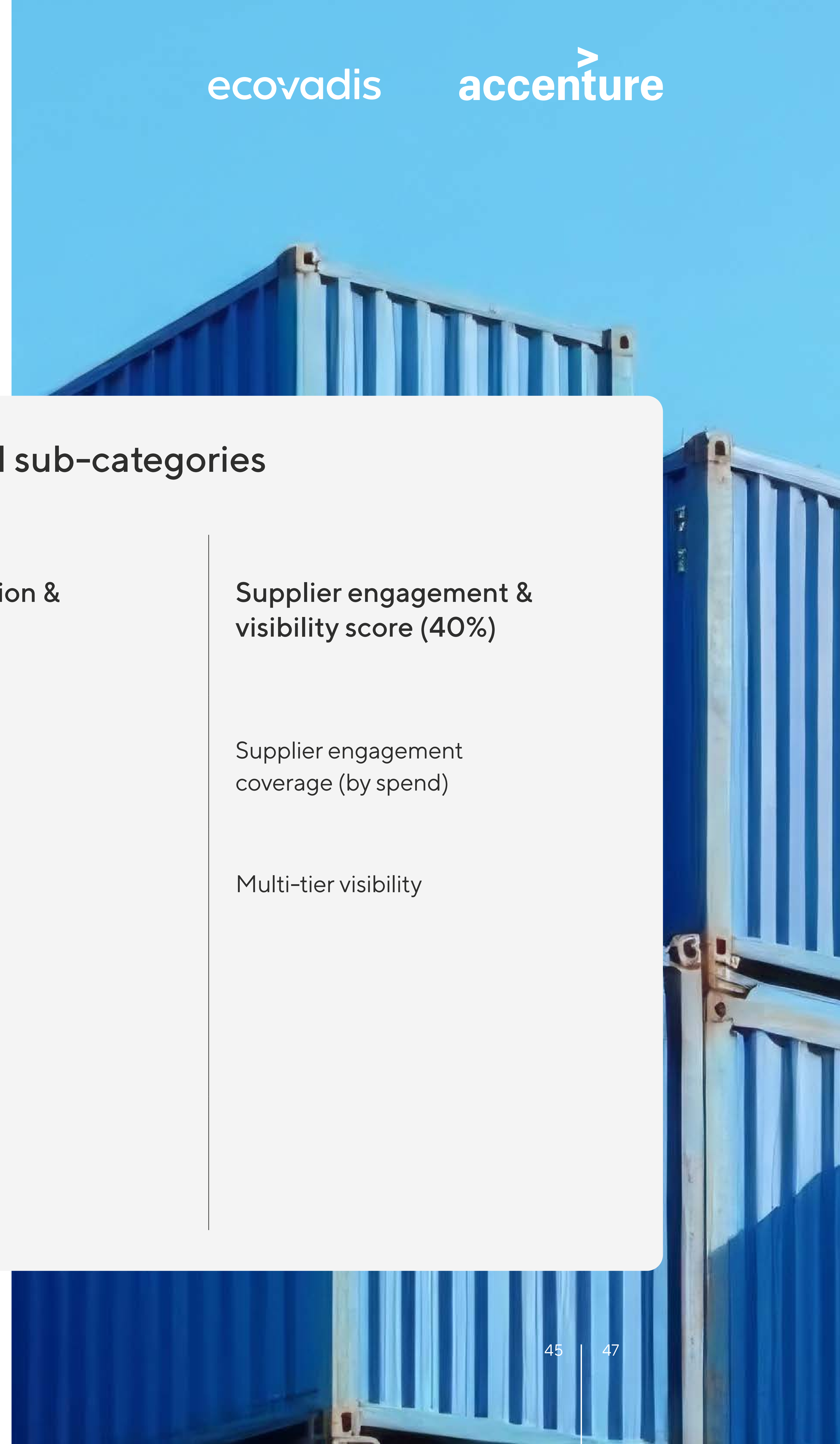


Leadership methodology

Leadership was determined based on surveyed organizations' reported capabilities across three core themes: sustainability strategy and governance, digital integration and AI, and supplier engagement and visibility.

A composite index weighted these dimensions at 20%, 40%, and 40%, respectively, using measures including program tenure, team structure and capability, cross-functional integration, digital integration of sustainability criteria, AI adoption, supplier engagement coverage, and multi-tier visibility.

Organizations ranking in the top 10% of the overall index were classified as leaders.



Leadership methodology: Themes and sub-categories

Sustainability strategy & governance score (20%)	Digital integration & AI score (40%)	Supplier engagement & visibility score (40%)
Program tenure	Digital integration	Supplier engagement coverage (by spend)
Dedicated sustainable procurement team	AI adoption	Multi-tier visibility
Team capability		
Cross-functional integration		

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About EcoVadis

EcoVadis is a purpose-driven company dedicated to embedding sustainability intelligence into every business decision worldwide.

With global, trusted, and actionable ratings, businesses of all sizes rely on EcoVadis' detailed insights to comply with ESG regulations, reduce GHG emissions, and improve the sustainability performance of their business and value chain across 220 industries in 180 countries.

Leaders like Johnson & Johnson, L'Oréal, Unilever, Bridgestone, BASF, and JPMorgan are among 150,000+ businesses that use EcoVadis' sustainability ratings, risk and carbon management tools, and e-learning platform to accelerate their journey toward resilience, sustainable growth, and positive impact worldwide.

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Accenture is a leading solutions and services company that helps the world's leading enterprises reinvent by building their digital core and unleashing the power of AI to create value at speed across the enterprise, bringing together the talent of our approximately 784,000 people, our proprietary assets and platforms, and deep ecosystem relationships.

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Disclaimer: Accenture has collaborated with EcoVadis on its Sustainable Procurement Barometer since 2024 to gather and synthesize perspectives from business leaders on sustainable procurement. Policy positions do not necessarily reflect the views of Accenture.