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Sustainable supply chains

An industry temperature check



Introduction to the sustainable supply chains survey

Purpose and goal of the survey

Our primary objective of this survey is to gauge the maturity of environmental sustainability in supply chains, comprehend the challenges faced by organisations like yours and identify opportunities in the sustainability transformation. The results will fuel knowledge building and enrich conversations about supply chain sustainability, with industry-focused findings for deeper insights.

Key findings

Current state and ambitions

Over 50% of respondents consider supply chain sustainability as urgent, yet many struggle to implement practices across their value chain, as current efforts focus on internal operations and energy. Driven by company values, customer expectations and regulatory compliance, many companies aim for net-zero emissions or excellence in sustainable supply chain practices.

Challenges and barriers

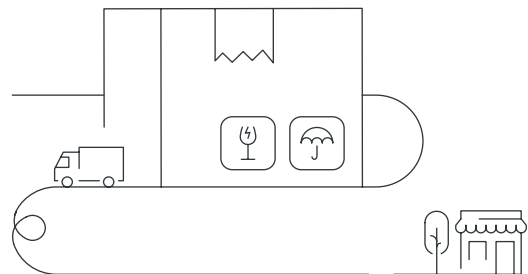
Among the key challenges and barriers companies face in integrating sustainability into their supply chain are finding cost-effective solutions, addressing customer willingness to pay, ensuring supplier capabilities, enhancing supply chain visibility and building internal capabilities.

Opportunities

The results show that many companies see integrating sustainability into their supply chains not only as a challenge but also as an opportunity for cost savings, improved collaboration, innovation and market differentiation. They have the chance to focus their efforts where they perceive the greatest impact, particularly in sourcing, transport and manufacturing.

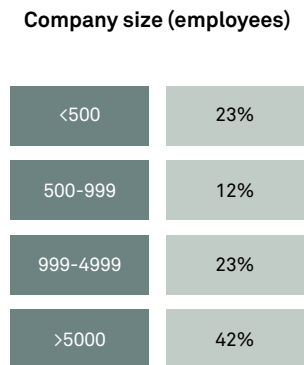
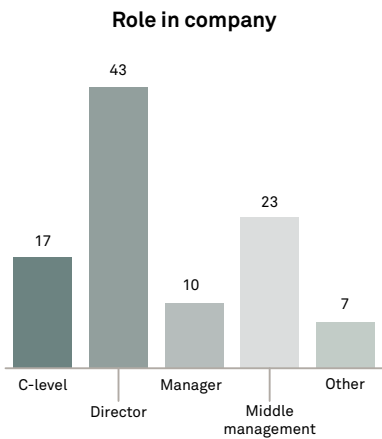
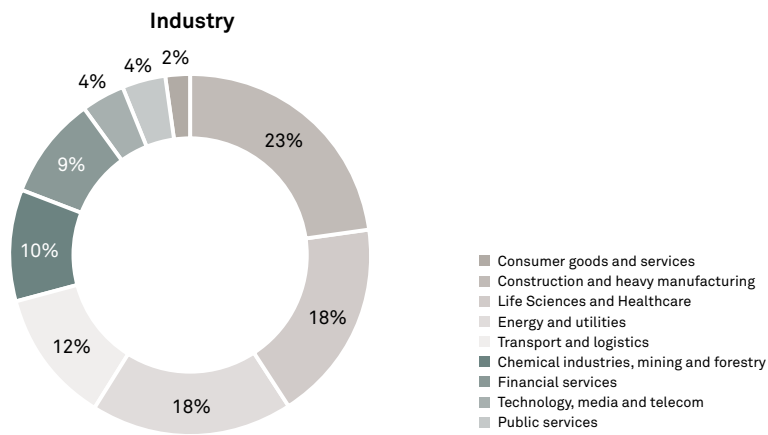


~100 supply chain professionals have assessed their supply chains from a sustainability perspective, and this is what they answered.



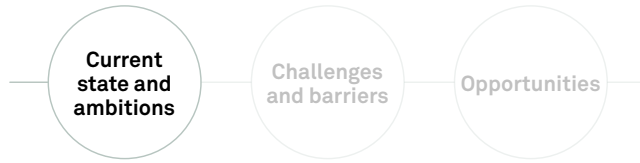
Our survey respondents span various industries and hold diverse roles within their respective companies

Number of respondents ~100



Survey respondents vary between 79 and 99, depending on the question.



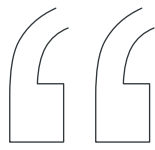
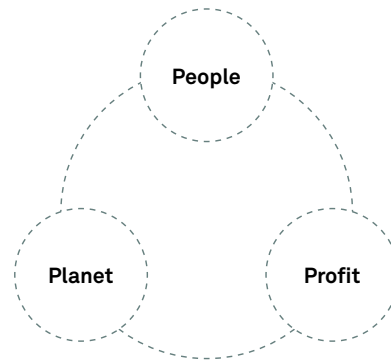


Current state and ambitions

More than

50%

of the respondents say that supply chain **sustainability is business critical** to them now or that they are already falling behind.

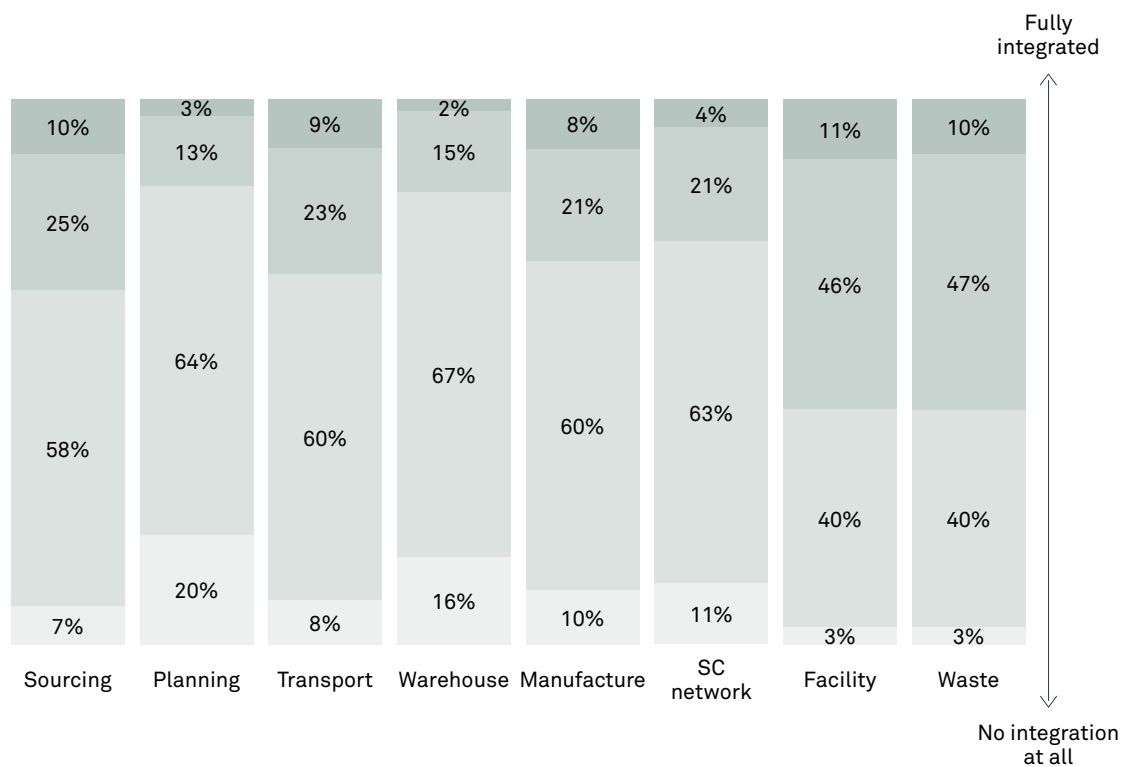


Some years ago, it was a competitive advantage, but now it's a minimum requirement if we want to remain relevant in the market.



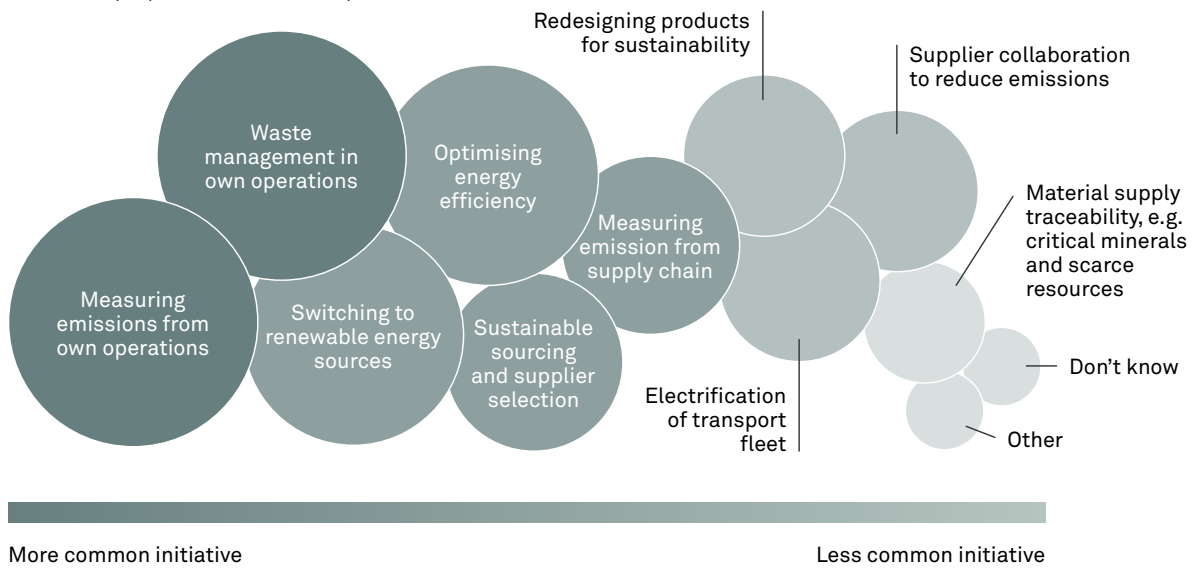
Many companies are still struggling to implement sustainable supply chain practices across their value chain

The extent that companies have integrated **environmental sustainability** into their supply chain.

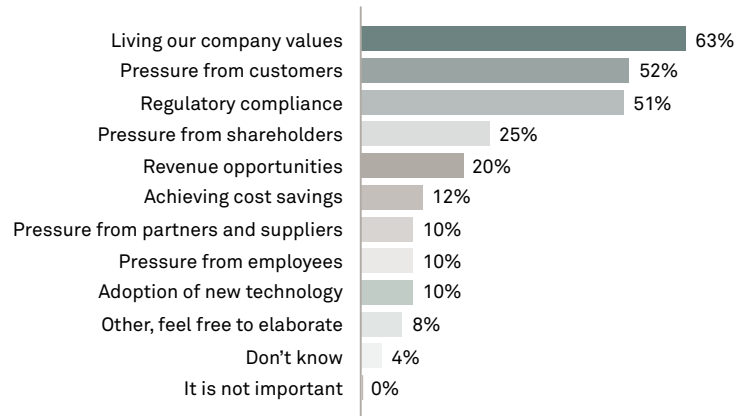


Sustainable supply chain practices that companies are currently working with are predominantly actions within their own operations and with regards to energy

Circle size proportional to # of respondents



Living our company values, pressure from customer and regulatory compliance are the **top 3 drivers** for implementing sustainable supply chain practices by many companies



60% believe that the strategic environmental ambition of their company is to reach **net zero** or **be among the best** in their supply chain practices

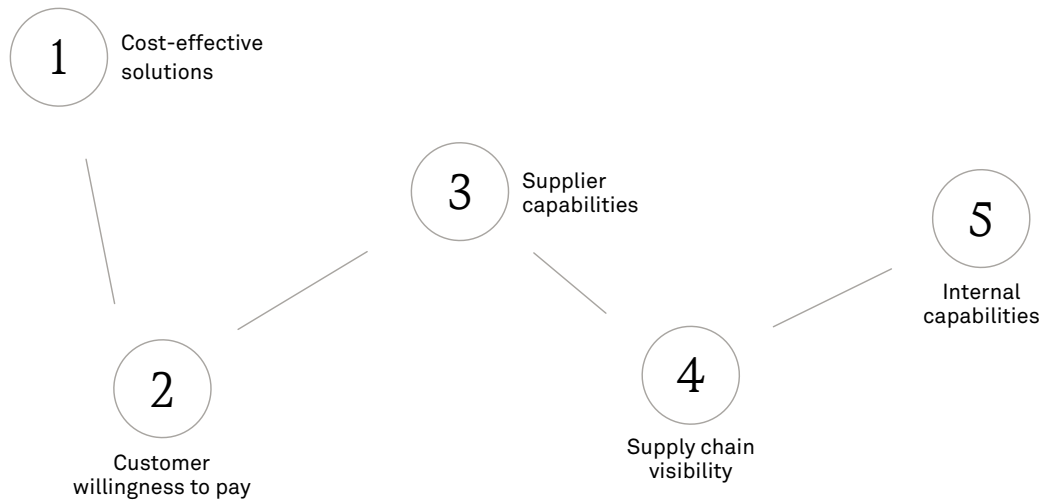


Net zero – 30% Lead the industry – 30% Business risk mitigation – 40%





Challenges and barriers



... are the **top five challenges** companies experience working with integrating sustainability in their supply chain.

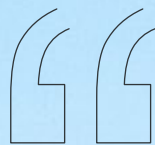
The numbering from 1 to 5 indicates the top five challenges, with 1 representing the biggest challenge, 2 the second biggest and so on.

“ “ It’s still “costly” to improve.
We need to find a win-win.

We have asked our respondents:

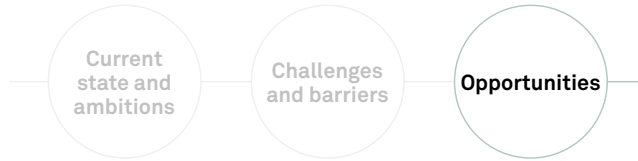
What do the pain points mean to you?

- 1 Cost-effective solutions**
“The cost of being sustainable is often too high. We are focusing on balancing profits with the cost of pushing sustainability.”
- 2 Customer willingness to pay**
“Despite the yearbook saying 2024, we are still in competition with fossil fuel. It’s a price game rather than an emission game.”
- 3 Supplier capabilities**
“Many suppliers have no knowledge or motivation for sustainability. We struggle with setting tangible and simple net-zero requirements for suppliers.”
- 4 Supply chain visibility**
“Addressing largest source of emissions which happens upstream and many tiers away. We need shared data flows and documentation across supply chain.”
- 5 Internal capabilities**
“We are too immature in many of our processes and business practices. We lack practical knowledge of what to do.”



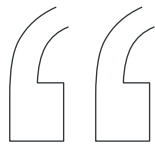
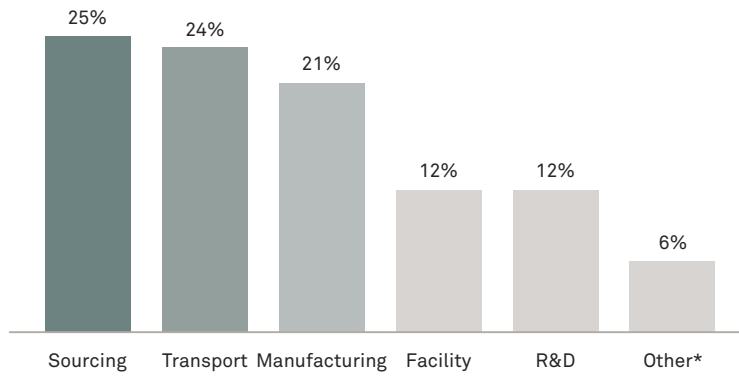
Sustainability concepts should be easily understood by all stakeholders to enable right decision-making that leads to decarbonisation. It should not be too complex to be understood by everyone across the organisation.



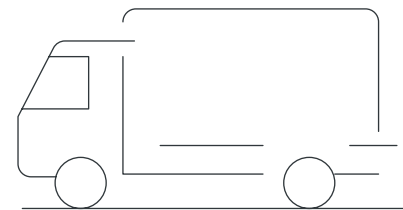


Opportunities

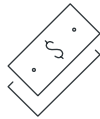
Many companies have the chance to capitalise on focusing their efforts where they perceive the impact to be the greatest



We are our customers' scope 3, and being on the forefront of sustainability transparency allows us to become partners of choice on our customers' sustainability journey.



Although many companies are facing hurdles in integrating sustainability into their supply chains, they also recognise it as an opportunity for cost savings, enhanced collaboration, innovation and market differentiation



Efficiency gains and cost savings

A market shift towards new technologies driving higher volumes and reduced costs and viewing sustainable practices as key to achieving increased operational efficiency, cost savings and waste reduction.



Partnerships and collaboration

Forming closer and better cooperation with suppliers, emphasising the importance of strong supplier relationships for sustainability initiatives.



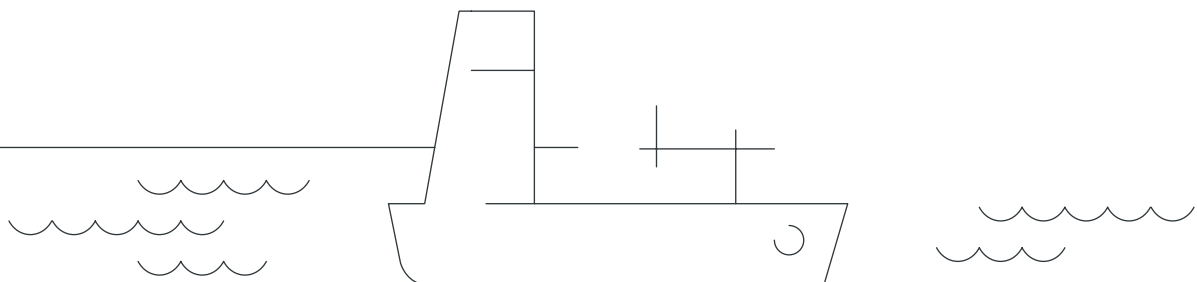
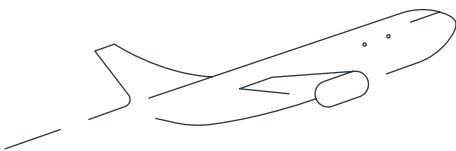
Differentiation and customer trust

Implementing sustainable practices as a means to achieve increased operational efficiency, leading to cost savings and waste reduction.



Innovation and new markets

Embracing sustainability is a way to differentiate businesses in the market, attract environmentally conscious consumers and build trust.



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