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New global survey: industrial energy efficiency is moving from sustainability to resilience and competitiveness – but delivery is not keeping up

- 98% of companies are investing or planning to invest in energy efficiency. Yet, structural gaps in financing and internal capabilities are slowing delivery as rising energy costs tighten their grip on profitability
- The financial barrier is falling – cost cited as the primary obstacle dropped ten points in two years – but the barriers that remain are proving harder to fix
- Transportation has surged as a priority, up twelve points since 2024, as the efficiency agenda expands beyond the factory floor, becoming a resilience and competitiveness priority

The Energy Efficiency Movement (EEM) has today published its third global report on energy efficiency investment in industry. The findings confirm that the case for energy efficiency has never been more widely accepted, and that the gap between commitment and delivery has never been more costly to ignore.

Energy now accounts for 23% of operating costs for businesses surveyed. More than half (54%) say rising energy prices pose a moderate or major threat to profitability, a figure that has grown with each successive EEM survey since they began in 2022. In sectors with the highest energy intensity, the exposure is considerably more acute. For these businesses, coping with a permanent energy crisis, managing energy use and managing financial performance have become the same task.

The response across industry has been decisive in intent. Nearly all organizations surveyed (98%) are already investing or actively planning to invest – up from 93% in 2024. Half are targeting Net Zero within five years. But financial discipline is shaping what gets funded and what gets deferred: 83% require a return on energy efficiency investment within five years, and 40% within two years. Nearly a third (31%) lack the specialist resource to implement projects. A further 29% report a digital skills gap, and almost a quarter (23%) say they do not have sufficient data to justify investment internally. The infrastructure for action is being built; the capacity to act on it is lagging behind.

"The cost of inaction is now harder to justify than the cost of investment, and businesses know it," said Mike Umiker, Managing Director of the Energy Efficiency Movement. "The share of organizations citing upfront cost as their primary barrier has fallen from 53% in 2024 to 43% today. That ten-point drop tells us something important: the financial argument for energy efficiency is landing. But progress is not accelerating to match. The barriers that remain are structural; a shortage of skills, a lack of specialist expertise, and in too many cases, insufficient data to make the internal business case. Those are not problems you can solve with a cheque."

The report also points to a significant broadening of where businesses are directing investment. The share of organizations prioritizing transportation and logistics has risen from 37% in 2024 to 49% in 2026, reflecting a move away from individual asset upgrades toward a system-wide view of energy use. More than 60% have invested in energy audits and cloud data management to build the foundation for that wider approach.

"Energy efficiency is no longer a sustainability topic in isolation, it has become a test of industrial competitiveness and resilience," Umiker added. "81% of organizations say better financing or government incentives would increase their investment, and more than half say they need external support across four or more areas. The tools and the technologies exist. What is needed now is a stable framework across policy, finance, and industry to deploy them at the pace this moment demands."

The findings land at the centre of a growing global debate on industrial energy security. The IEA's Global Conference on Energy Efficiency convenes on 29-30 June, in Montreal, bringing together government ministers, industry leaders, and financial institutions to address exactly these challenges. EEM will utilize the report findings for the conference, connecting the voice of 2,000 senior business decision-makers directly to the policy and investment conversations underway.

The full report – *Energy Efficiency Investment Report 2026: Rising energy costs are outpacing the efficiency response* – covers major energy-intensive sectors across North America, Europe, Asia-Pacific, and Latin America. Survey respondents were senior decision-makers at small, medium and large organizations. Download [here](#).

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About the Energy Efficiency Movement

The **Energy Efficiency Movement** (EEM) is a non-profit association empowering the adoption at scale of energy efficiency within industry. The Movement accelerates energy efficiency in industry by sharing knowledge, enabling training and fostering collaboration. We unite industry leaders and leverage their collective expertise and resources to drive the world towards net zero. The EEM was launched in 2021 as a voice of industry and now serves more than 600 organizations in 40-plus countries. www.energyefficiencymovement.com

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