2026's Biggest Pharmaceutical Supply and Logistics Talking Points

2025 was a tumultuous year, riven with the consequences of global political instability, notably the looming threat, and implementation of, tariffs, alongside a number of high-profile patent cliffs, regulatory upheavals and cuts to long-standing funding.

The impact of tariffs in particular was at the heart of industry conversation, with the US seeing a 70% increase in medicine imports and a 493% increase in basic pharmaceutical product imports as a result, and certain estimates putting the potential cost per US household at $600 per year.[1,2] From a supply chain and logistics point of view, diversification, and how it could help mitigate the impact of tariffs, was a subject of much debate.

Whilst exemptions were struck in the US, and manufacturing expansion mooted and confirmed, the EU progressed the Critical Medicines Act, including measures to incentivise supply chain diversification and boost resilience, further fuelling discussion around how global supply chains can best be protected from political instability as well as pandemics or natural disasters.

But, alongside the challenges of 2025 were serious successes and signs of progress. Adoption of AI continued apace, with its application to drug discovery speeding development time and cutting costs. According to research from Mordor Intelligence, 95% of pharmaceutical companies are investing in AI capabilities, with the AI in Drug Discovery market size valued at USD 2.58 billion for 2025 and forecast to expand to USD 8.18 billion by 2030.[3]

All told, 2025 was a year of headlines for the pharmaceutical sector, and a year of challenges which were navigated with varying degrees of success. But, as we gather speed in 2026, what has changed and what has stayed the same? Which talking points are driving decision-making for the year ahead?

Below are three key subjects which we believe will unite the pharmaceutical community in shared discussion for 2026.

Intelligent Futures

Unsurprisingly, AI will remain a driving force across the pharmaceutical sector as we strive towards more intelligent and efficient ways of working. In 2026 we're likely to see great strides forward, as the exploratory pilots of 2025 develop into agentic, autonomous systems that make operational decisions independently.

For professionals in the pharmaceutical supply chain the question is how ethical AI frameworks can be used to drive innovation and transformation. At its simplest level, AI delivers efficiency through the automation of previously time-consuming manual activities, batch processing huge volumes of data or ensuring regulatory compliance across complex chains at speed. It can also be a valuable addition to procurement processes, analysing vast quantities of information to recommend smarter sourcing and transport options, optimising pallets, for example, and driving down costs.

But beyond this, AI is increasingly being implemented as part of supply chain risk management strategies, analysing historic data to predict potential disruptions, optimising inventory levels and recommending production cadence in line with forecasted demand.

One area where this predictive technology is seeing strong adoption is in cold chain logistics. The sensitive nature of temperature-controlled shipments means the enhanced visibility and predictive capabilities of AI provide a game-changing new level of product assurance.

Intelligent data management is able to collate and analyse data from every shipment, assessing route performance, identifying regular deviations, monitoring thermal behaviour and more. This information can then be used to model shipments in advance, allowing for the identification of a wide range of potential supply chain disruptions, and providing recommendations on everything from the most suitable packaging solution to route adjustments in order to provide end-to-end assurance. As a result, the big questions around cold chain have shifted from the reactive, how to protect the cold chain, to the proactive, how to optimise and decarbonise it.

Ultimately, the utilisation of intelligent tools presents the opportunity to reduce waste, lower costs, improve reliability and – most importantly – protect product integrity from manufacturer to patient, making it a technology which is here to stay.

Perhaps a more divisive topic when it comes to the future of agentic intelligence in pharma is its impact on the workforce. The question of how human skills combine with AI capability is not unique to our sector. In fact, a recent Government survey found that a third of the UK public fear that the evolving adoption of AI will put their job at risk, a fear which is perhaps not unfounded, given that a US based survey saw respondents predicting a 30 percent decrease in workforce as a result of AI.[4,5]

However, the efficiencies and savings offered by agentic solutions are undeniable, and emerging conversations centre on how the workforce can adapt to AI, rather than whether it is included at all. The future could look like reskilling for AI-driven roles, redefining which roles are needed or a re-examination of the importance of humanity in pharma, emotional intelligence and creativity, and how those capabilities impact a sector which functions to support and benefit human life.

This period of uncertainty, where the balance between man and machine has yet to be established, will doubtless give rise to much debate throughout 2026 and beyond, with the respective benefits of efficiency and financial savings weighed against the human factor in decision making.

Resilient Networks

In the midst of so much uncertainty, from geopolitical shifts (tariffs, US administration instability) to cost volatility, the future of healthcare delivery and the vital importance of network resilience are likely to be top of mind for pharma professionals in 2026.

The geopolitical instability of recent years continues, with the navigation of tariffs, trade wars and regional conflict posing significant

supply chain risk. Macro policy events have, of course, always had an impact on pharma networks, but the sliding balance of power between emerging drug developers like China and long-term onshoring goals pursued by the US and Europe have arguably resulted in a particularly challenging environment.

For major pharmaceutical companies, nearshoring or reshoring presents an opportunity for greater protection against the volatility of global politics and tariffs, and incentives are being introduced to support this. As part of its Critical Medicines Act, the European Parliament is proposing to implement a Most Economically Advantageous Tender (MEAT) criteria, designed to favour companies where a significant proportion of production is located in the EU, whilst the US is offering a variety of reshoring incentives including the Reshoring Manufacturing Executive Order and the Inflation Reduction Act.

However, the question we'll see in 2026 is how the resilience benefits of reshoring and nearshoring weigh against overall efficiency losses, and how supply networks as a whole will need to be structured as local manufacturing becomes more widely adopted.

Another key topic on the subject of resilient networks is sustainability. Where once sustainability was seen as a compliance check box, it has become a strategic imperative and a core consideration in the design and management of pharma supply chains.

While ESG has recently experienced social and political 'pushback' in certain regions, it has, for many, evolved from a regulatory framework to a strategic tool. ESG data, for example, can indicate the reliability of a supplier and the likely risk of disruption or default due to sanctions related to health and safety or human rights.[6]

Similarly, circular value chains are now being considered in the context of wider business survival. The European Commission is working to incentivise circularity as a competitive differentiator, whilst Deloitte's Circularity Gap Report 2025 positions circular solutions as the only clear way to meet growth and global sustainability targets whilst protecting network resilience.

Circularity reduces reliance on external suppliers and material extraction, both of which can be impacted by geopolitics and natural disasters. While the effective downstream return of medication and associated packaging still presents an enormous regulatory and logistical challenge, the increasing integration of reusable packaging into supply chains represents a positive step on the long road to broader value chain circularity.

2026 will see several speaking events on the subject of circularity, with industry leaders such as GSK set to share comment on logistics sustainability, and the likes of CEVA hosting masterclasses on circular value chain, a testament to the emphasis being placed on these topics within the industry.

Global Health Impact

At the heart of pharmaceutical conversation, regardless of broader geopolitical challenges, is the unchanging focus on the sector's overall impact on global health.

As a community, the objective is always to make access to medicines smarter, faster and fairer for patients. This aim is subject to many challenges, among these the obstacles presented by geopolitical uncertainty and access.

For 2026, vaccine access in remote regions remains a significant point of

concern. According to the International Pandemic Preparedness Secretariat (IPPS), global pandemic preparedness is becoming "increasingly fragile at a time of growing biosecurity and geopolitical risk".[7] And, while this applies globally, the question of equitable access was specifically highlighted by the IPPS.

Following the G20 Health Ministers' Meeting in November of last year, the Regionalized Vaccine Manufacturing Collaborative (RVMC) launched its first Status Report and Dashboard: Towards Regionalised Vaccine Manufacturing. Without access to advanced platforms and local clinical trials, the report notes, regions are unable to pivot quickly during outbreaks or meet routine immunization needs.

But, while RVM is a long-term goal on the roadmap to equitable access, the conversation around what can be done now remains active. For example, pharmaceutical industry collaboration between NGOs and non-profits remains a key factor in the support of healthcare for vulnerable populations, but how these partnerships are forged and maintain both ethical standards and transparency is a matter of debate.

Similarly, industry conversation around how supply chain innovation can support equitable healthcare delivery is ongoing. What changes in terms of transport routes, supplier selection and production can be made to support globally accessible healthcare? What can we learn by soliciting external and non-pharma perspectives?

Collaborations such as that between Pfizer, Gavi and UNICEF provide insight into what can be achieved by humanitarian supply chains, and the 2026 pharma event calendar offers opportunities to learn from partnerships such as these.

As we progress into what is almost certainly going to be yet another year of challenge and change for the industry, almost nothing is guaranteed. However, as a community, the focus remains upon what matters most, delivering for patients. In terms of how we achieve this, there are no set parameters, but for 2026, a strong focus on intelligent futures, resilient networks and global health impact will provide a strong foundation for creating meaningful change. As ever, collaboration and communication will enable the pharma industry to evolve, and it is by having crucial, and often difficult, conversations that this will be achieved.

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Ben Sharples is a seasoned professional with extensive experience in event management and business strategy. Currently serving as event director for LogiPharma, Ben aims to facilitate industry-critical conversations for pharmaceutical professionals at this year's event, increasing the level of interactivity featured within the 2026 agenda and prioritising attendee engagement.