

GREEN GROWTH TRENDS IN THE EAST MIDLANDS 2026

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HEADLINES

Based on the responses to the East Midlands Chamber (Derbyshire, Leicestershire and Nottinghamshire) Quarterly Economic Survey in quarter two of 2026:



-3.4%

GREEN GOODS AND SERVICES SALES ARE SLOWING

The percentage of businesses deriving sales from supplying green goods and services (GGs) has dropped 3.4% reaching 42.8% in the second quarter of 2026, down from 46.2% in 2025.



+9.4%

IMPROVEMENTS IN THE UPTAKE OF NATURE-BASED SOLUTIONS

Around 43.1% of regional businesses reported they engaged with nature-based solutions in 2026, up 9.4% on 2025 position.



-5.7%

DROP IN BUSINESSES ACCESSING SUPPORT

Businesses reported they accessed less of the business support in 2026 than in previous years. Only 15.5% of businesses use business support, a drop of 5.7% on 2025 position.



×2.7

LONGITUDINAL GREEN GROWTH TREND HOLDS

Near threefold increase in East Midlands businesses reporting turnover from Green Goods and Services (GGs) since the 2015 baseline.



-3.6%

BUSINESSES INVEST LESS IN DECARBONISATION

About 44.5% of businesses report investment in decarbonisation over the last 12 months, a drop of 3.6% on 2025 data.



+1.6%

POSITIVE RESPONSE TO POLICY

A small increase of 1.6% in businesses stating that regional policy allows businesses to fully engage in green growth.



TOP 5

GREEN SKILLS REMAIN

The largest demand for green skills development is in energy efficiency, resource efficiency and business strategy, followed by digital skills and waste management.



-1.6%

DIFFICULTY IN COLLABORATING FOR GREEN GROWTH

Over a third of regional businesses reported difficulty in identifying collaborative opportunities for green growth. Only 7.5% of regional businesses collaborated for green growth, a drop of 1.6% on 2025 position.

KEY MESSAGES

“ECONOMIC CHALLENGES, REDUCTION IN BUSINESS SUPPORT, AND INCREASING COST BASE OF OPERATING ON NATIONAL AND INTERNATIONAL MARKETS RESULTED IN **A DROP OF THE UPTAKE OF GREEN GROWTH STRATEGIES BY THE EAST MIDLANDS BUSINESSES THIS YEAR.**”

“THE SALES GENERATED FROM GREEN GOODS AND SERVICES ARE REPORTED BY **42.8% OF BUSINESS, A DROP OF 3.4% ON 2025 FIGURES.**”

“BUSINESSES INVESTED LESS TO DECARBONISE IN 2026. JUST OVER 44.5% OF BUSINESSES INVESTED IN CARBON REDUCTION, **A DROP OF 3.6% ON LEVELS OF INVESTMENT IN 2025.**”

“**ALMOST +10% INCREASE IN BUSINESSES REPORTING ENGAGEMENT WITH NATURE-BASED SOLUTIONS(NBS) IN 2026;** WHILST 47.1% OF BUSINESSES REPORTED NO EXPERIENCE OF NBS STILL.”

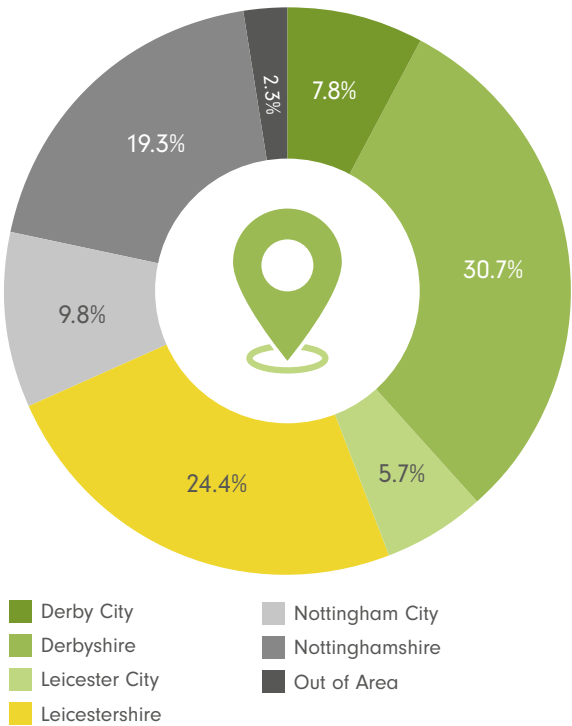
“DEMAND FOR GREEN SKILLS REMAINS STRONG WITH TOP 5 SKILLS AS **ENERGY EFFICIENCY, RESOURCE EFFICIENCY, BUSINESS STRATEGY, DIGITAL SKILLS AND WASTE MANAGEMENT SKILLS.**”

“COLLABORATION IS KEY TO HARNESSING THE BENEFITS OF SUSTAINABLE GROWTH. HOWEVER, **ONLY A SMALL PROPORTION OF REGIONAL BUSINESSES (7.5%) ACTIVELY COLLABORATED FOR GREEN GROWTH IN 2026, A DROP FROM 9.1% IN 2025.**”

INTRODUCTION

This report presents an analysis and discussion of the green growth trends and decarbonisation based on the data collected as part of the East Midlands Chamber Quarterly Economic Survey (QES) which ran from 11.05.2026 to 15.06.2026. Whilst the QES routinely explores a range of business interests, this analysis refers to a series of questions surveying awareness and engagement of regional businesses with green growth, decarbonisation, uptake of the nature-based solutions (NBS) and collaboration for green growth.

Figure 1: Survey responses by geography



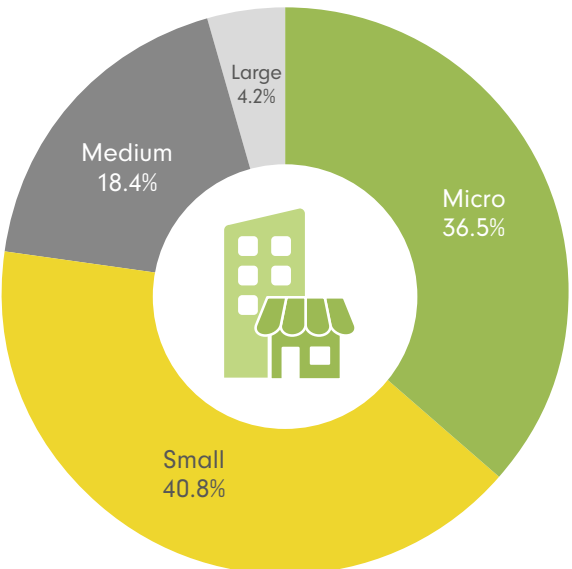
The survey received a total of **348 responses in Q2 of 2026**

- **38.5%** from Derbyshire County and Derby City
- **29.0%** from Nottinghamshire County and Nottingham City
- **30.2%** from Leicestershire County and Leicester City
- **2.3%** responses are outside the East Midlands

Sectoral responses matched the previous reports into green growth trends with most survey responses, at 63.5%, coming from the services sector. Manufacturing and construction comprised 36.5% of the survey responses, which is representative of the sector breakdown in the East Midlands (Midlands Engine, 2023).

Micro businesses represented 46.3 % of survey responses followed by 31.0% small, 15.8% medium-sized and 6.9% large businesses. The proportion of SMEs in the survey responses was 93.1%, which is comparable with the regional business composition. According to Office for National Statistics figures, there were 181,250 of SMEs accounting for 99.6% of East Midlands businesses in 2024. Nationally, the same picture holds: SMEs represented 99.6% of business in the UK in 2024 (ONS, 2024).

Figure 2: Survey responses by firm size



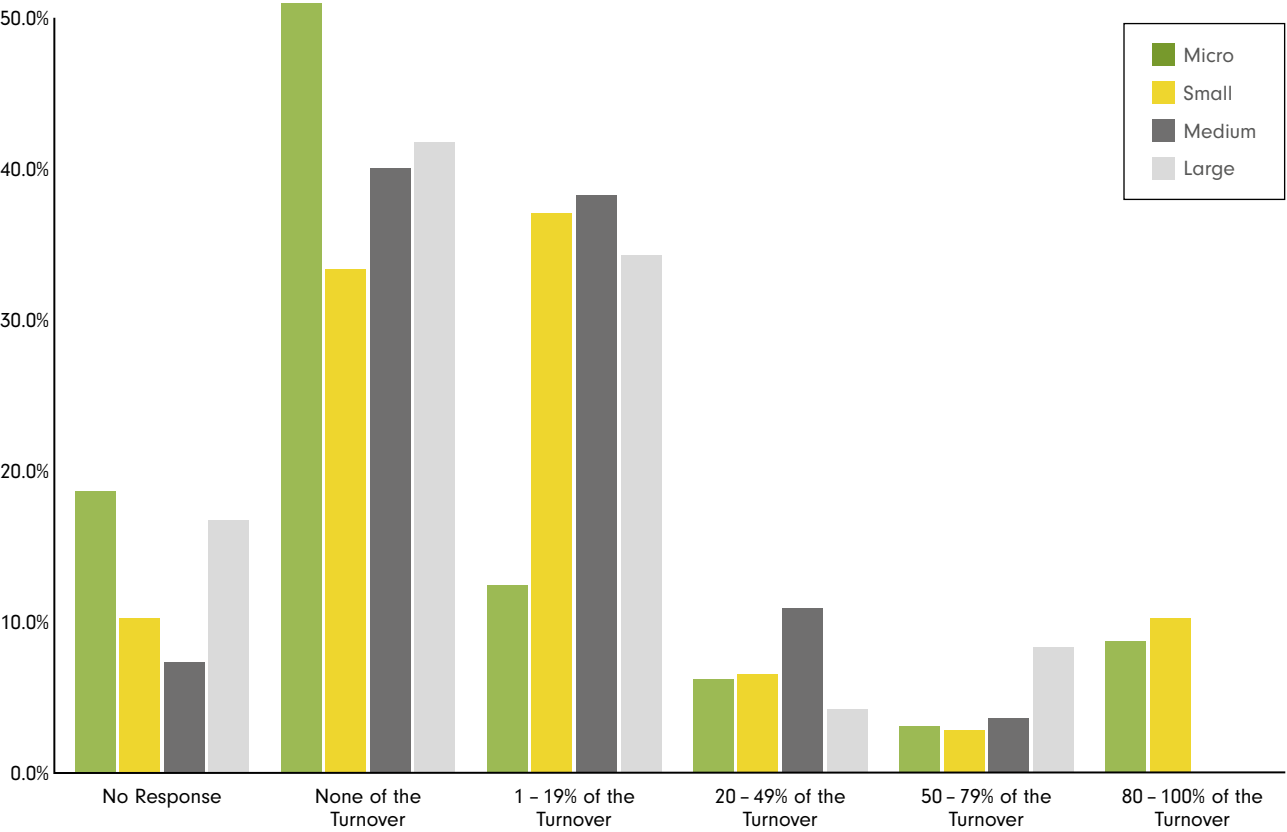
In this fast-moving arena, the terminology used by regulators and analysts is shifting. Previously, the Department for Business Innovation and Science used ‘LCEGS’ (low carbon and environmental goods and services) as an umbrella term to capture a range of business activities, spread across many existing sectors (like transport, construction, energy etc.). That focused upon the common purpose of reducing environmental impact (DBIS, 2015). However, the Office for National Statistics (ONS) now distinguishes between the Low Carbon and Renewable Energy Economy (LCREE) and the Environmental Goods and Services Sector (EGSS). Throughout this report we refer to ‘Green Goods and Services’ (GGs) - a term that reflects the broadest range of environmentally friendly products and services.

GGs TURNOVER

Q2 2026



Figure 3: Green growth by a firm size



42.8% of regional businesses generated a proportion of sales from green goods and services (GGSs) in 2026. This represents a drop of 3.4% from 46.2% in 2025. Just over 43% of businesses reported they did not generate any GGS turnover, 10.5% increase on 2025 results (*Baranova, 2026*).

The 1-19% GGSs turnover category remains the most common rate of GGS sales; it was reported by 25.3% of businesses surveyed. Just over 7.2% of businesses reported 80-100% share of GGS in firm's turnover followed by 6.9% of businesses reporting 20-49%GGS sales. Only 3.4% of businesses reported a GGS turnover share of 50-79% in 2026.

A comparative analysis of the sales generated from GGSs, with reference to the size of the firm, is presented in Figure 3. It shows over half (50.9%) of micro businesses reported no GGSs turnover in 2026, an increase of 10.6% on 2025 data. Just under 40% of medium-sized businesses reported GGS sales in the 1-19% turnover category, which is the largest share across all four GGS sales categories.

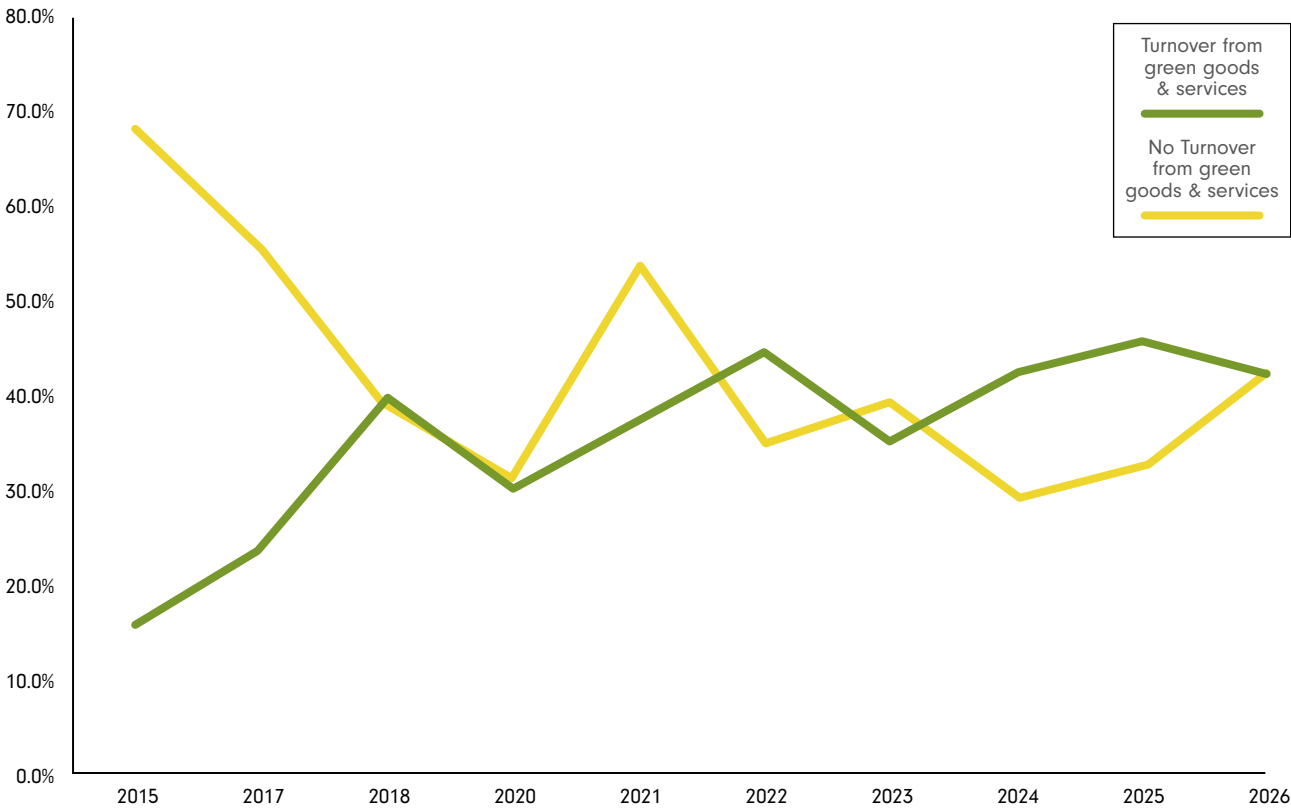
Medium-sized businesses make up the largest group reporting GGS sales in the 20-49% turnover category registering a 10.9% contribution. This is a drop of about 6% on 2025 data. Large businesses outperform others in the 50-79% turnover category, an improvement of 1.6% on the 2025 position. For the first time since 2023, no large or medium-sized businesses reported sales in the 80-100% of GGS turnover category in 2026.

GGs TURNOVER

TREND 2015-2026



Figure 4: Turnover generated from green goods and services 2015 – 2026



A similar survey exploring green growth trends has been carried out every year since 2015, except 2016 and 2019 (Figure 4). Despite a downturn in 2023, the overall trend has been positive. A number of regional businesses have reported a three times increase in GGS sales since 2015. On average, over a third of regional business reported sales of green goods and services over the last 11 years. The lowest level of GGS sales in the region was recorded in 2015 at 15.9% and the highest, at 46.2%, in 2025.

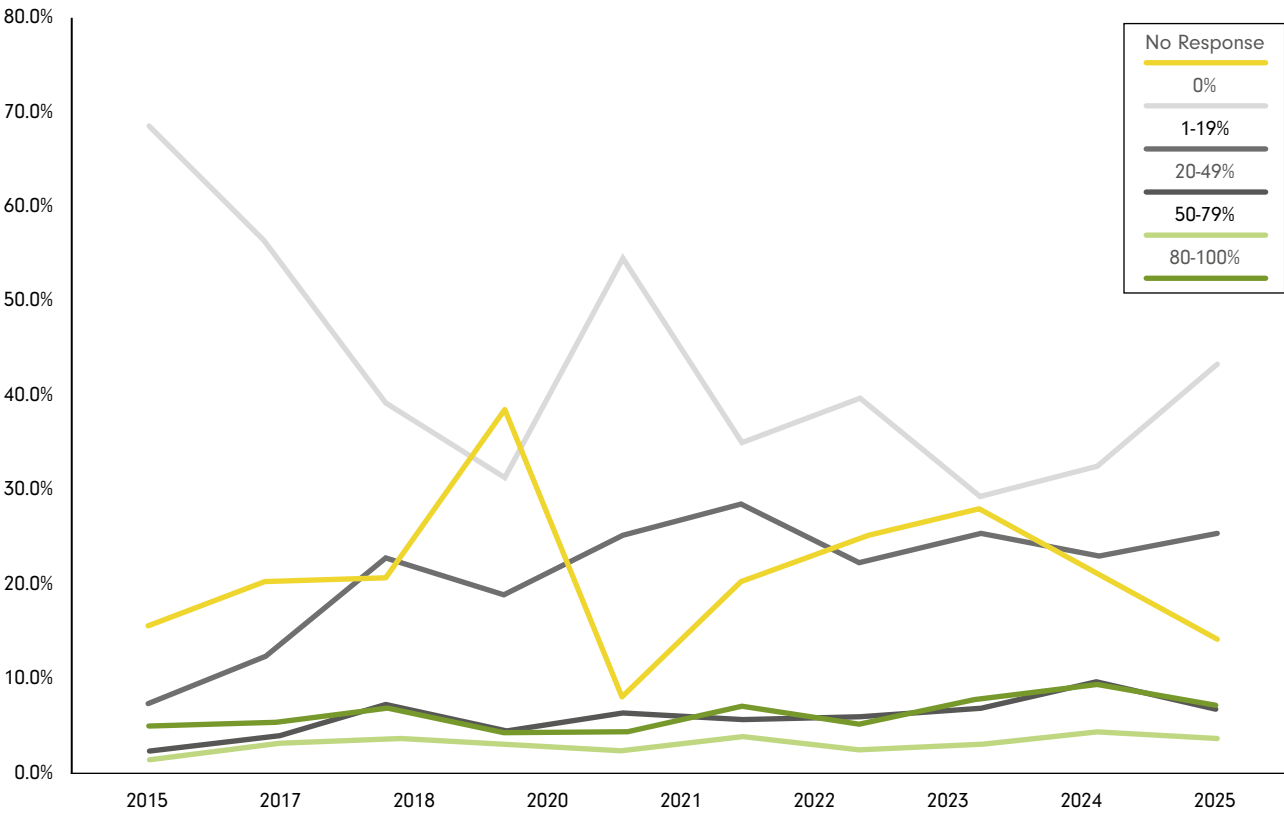
Findings from 2025, that revealed a gap of 13.6% between businesses that derive turnover from GGSs and those that do not, was shown to have narrowed in 2026. In fact, there are more businesses reporting no GGS sales, at 43.1%, than those that do generate GGS sales, at 42.8%. The gap is marginal at -0.3% but negative. The last time a similar scenario occurred was in 2023 where the green growth gap was -4.1%

The GGS sales gap closed due to businesses reporting lower or no sales from GGS in 2026. It is concerning to see a two-year sustained gap where the number of businesses trading in GGSs exceeded businesses reporting no GGS sales. In just one year the gap has disappeared.

GGGS TURNOVER TREND 2015-2026



Figure 5: Turnover generated from Green Goods and Services 2015 – 2026: a comparative analysis



A comparative analysis of the trend per GGSs turnover category reveals an interesting picture of regional green growth development over the last eleven years (Figure 5).

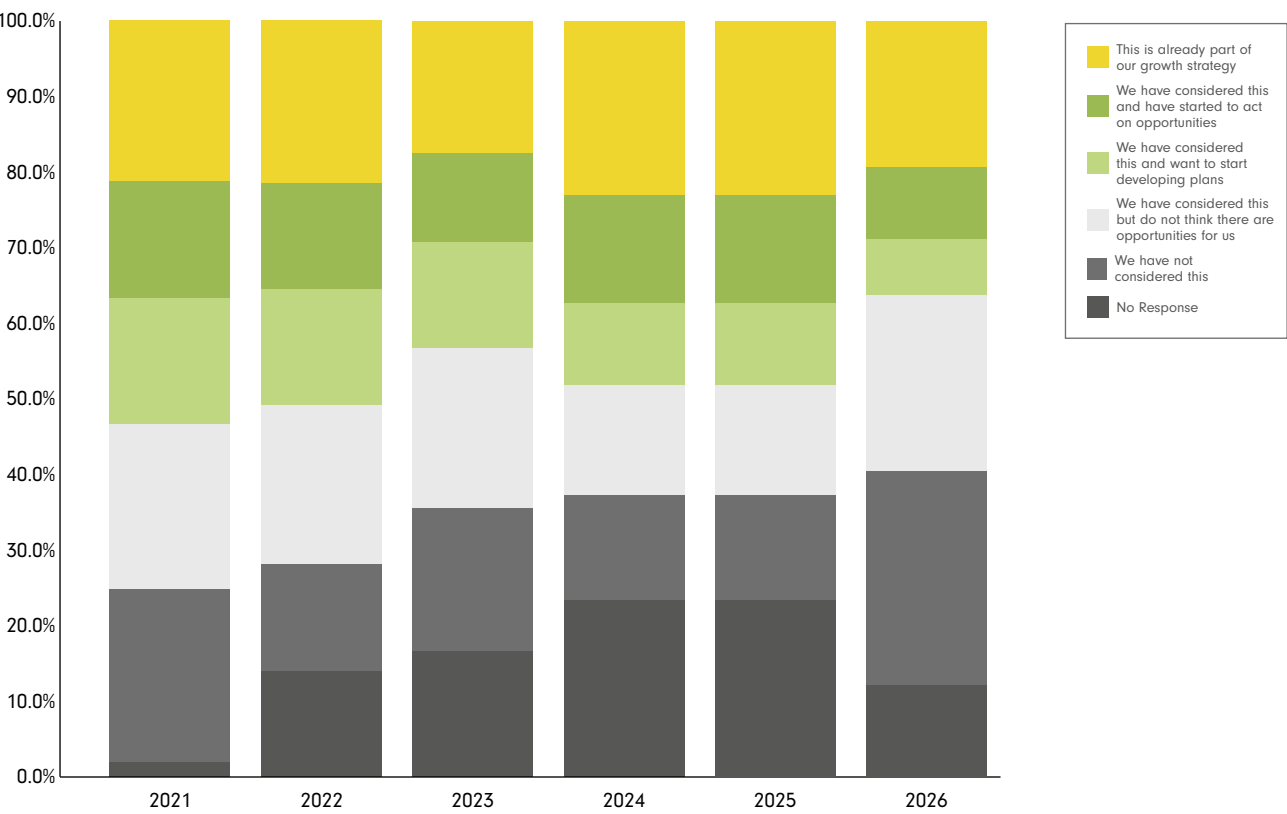
There has been a 10.5% increase in 'no turnover' from GGS in 2026 which is compounded by an overall decline of 3.4% across all the GGS sales categories. The only GGS sales category that grew was 1-19% by 2.3%. All the other GGS sales categories showed decline at -2.7% for 20-49%, -2.2% for 80-100% and -0.8% for 50-79% respectively.

Such a trend illustrates that most regional businesses are at early stages of green growth and still derive a large proportion of sales from non-green products and services. Green growth is fragile and is subject to stable economic and political conditions. Increasing uncertainty and business risks have negative impact on business appetite to support green and sustainable regional growth.

GREEN GROWTH STRATEGY



Figure 6: Green growth strategy adoption



The businesses were asked about the rate of green growth strategy adoption (Figure 6).

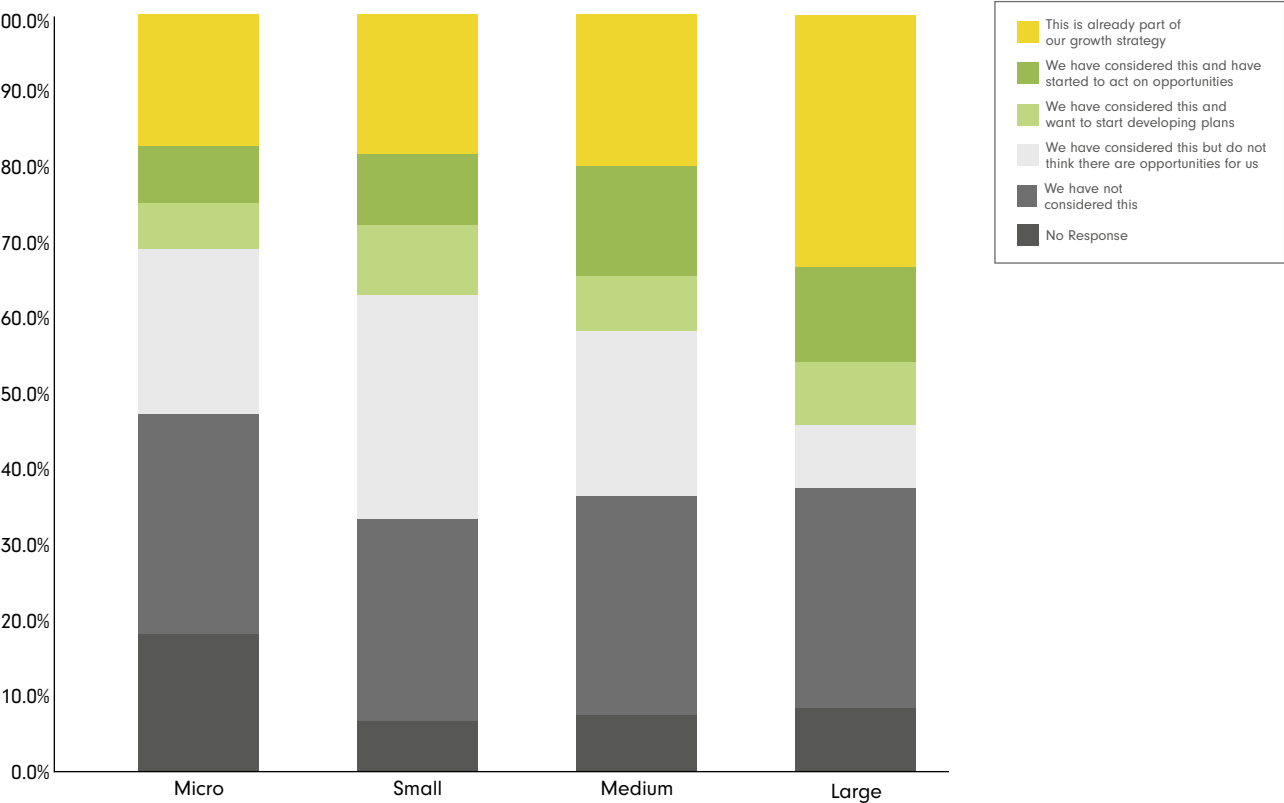
19.3% of regional businesses said green growth is already part of their business strategy. This is an increase of 1.1% on the 2025 results. Additionally, 9.5% of businesses indicated that they had 'considered [green growth] and are starting to act on opportunities'; this is down by 0.7% from 10.2% in 2025. Only 7.5% of businesses stated they are starting to develop green growth plans which is an increase of 1.0%. These findings signal a slight improvement of 1.4% in the uptake of green growth strategies on 2025 figures.

Despite this marginal improvement, just over 23.3% of businesses, an increase of 1.7% on 2025 figures, reported 'we have considered [green growth] and do not think there are opportunities for us'. More concerning is a 5.5% increase in business that reported they have not considered green growth at all. This was the highest level recorded and was shown by just under a third of businesses since 2021.

GREEN GROWTH STRATEGY



Figure 7: Green growth strategies by a firm size



Analysis of responses on green growth strategy adoption by company size, as shown in Figure 7, reflects the trends described in the academic literature (Baranova et al., 2025).

Larger companies remain well in advance of their smaller counterparts when approaching green growth strategically. Just over a third of large businesses reported green growth is already being a part of their business growth strategy compared with 20.0% of medium-sized, 18.5% of small, and 17.4% of micro businesses.

A lesser number of large businesses reported not seeing green growth opportunities to capitalise on, a drop of 11.7% on 2025 figures. Although this finding indicates improvements in business confidence levels among larger businesses, they are still at the lowest point since the study begun back in 2015.

The position of SMEs remains largely unchanged compared to previous years and indicates structural and resource difficulties when it comes to green growth strategy implementation. This trend needs further exploration to understand barriers and enable green growth relative to the size of a firm.

DECARBONISATION

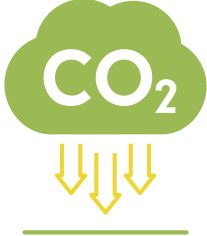
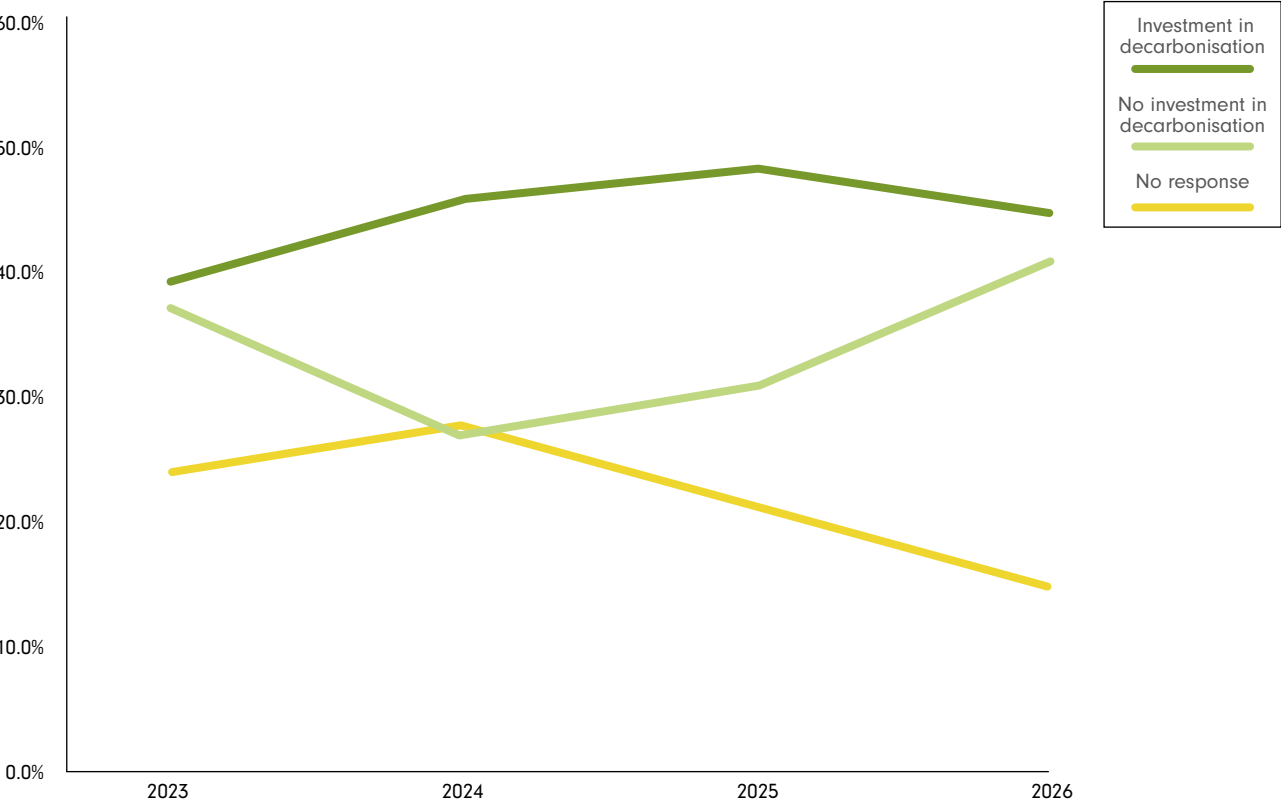


Figure 8: Decarbonisation investment in East Midlands, 2023 – 2026

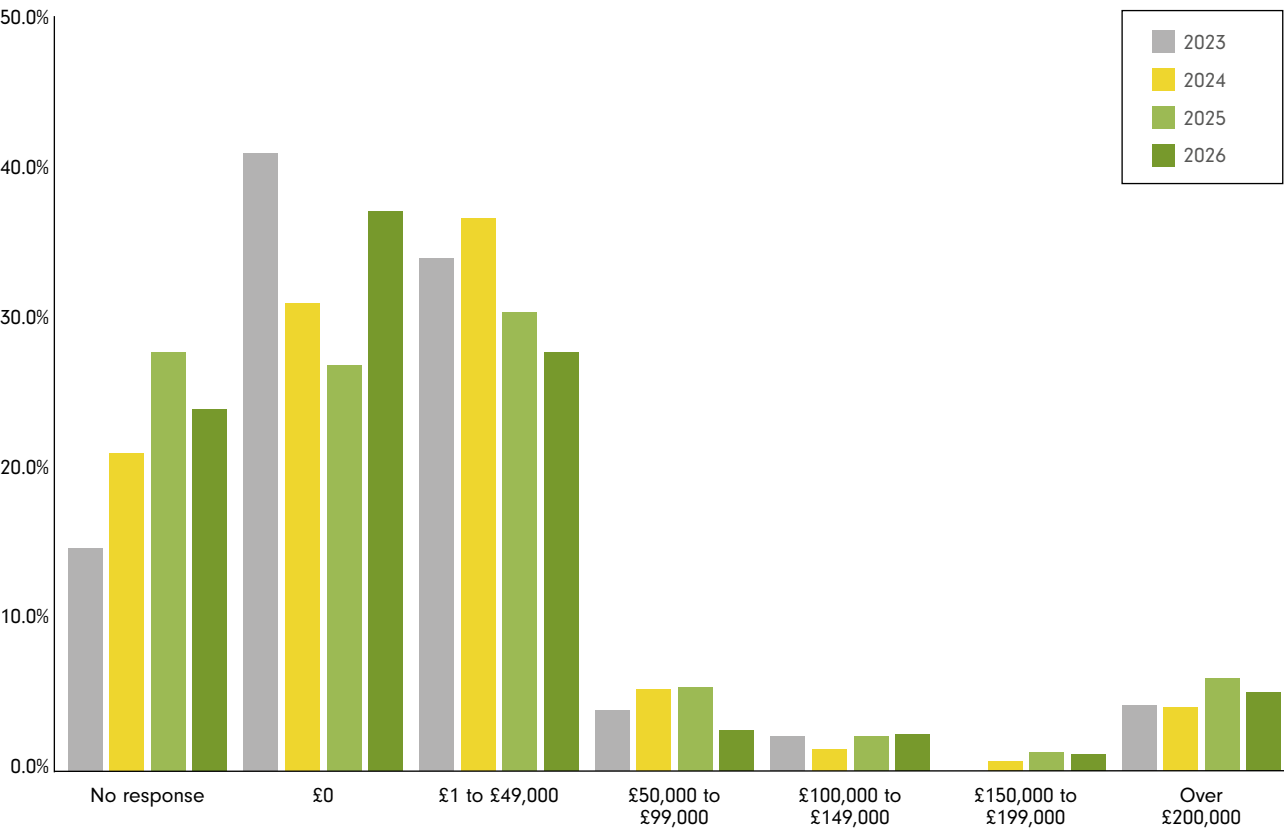


The number of regional businesses that invested in decarbonisation over the last 12 months has declined by 3.6% from the 2025 position. It was reported by 44.5% of businesses in 2026 which is close to the levels of investment in decarbonisation seen in 2023 (Figure 8).

More businesses reported 'no investment in decarbonisation' since data collection for this item began in 2023. In fact, this is the highest number of businesses reporting 'no investment in decarbonisation' at 40.8% since 2023. This is largely contributed to an increase of around 9.9% in this data category during the 2025-26 period alone.

DECARBONISATION

Figure 9: Decarbonisation by level of investment



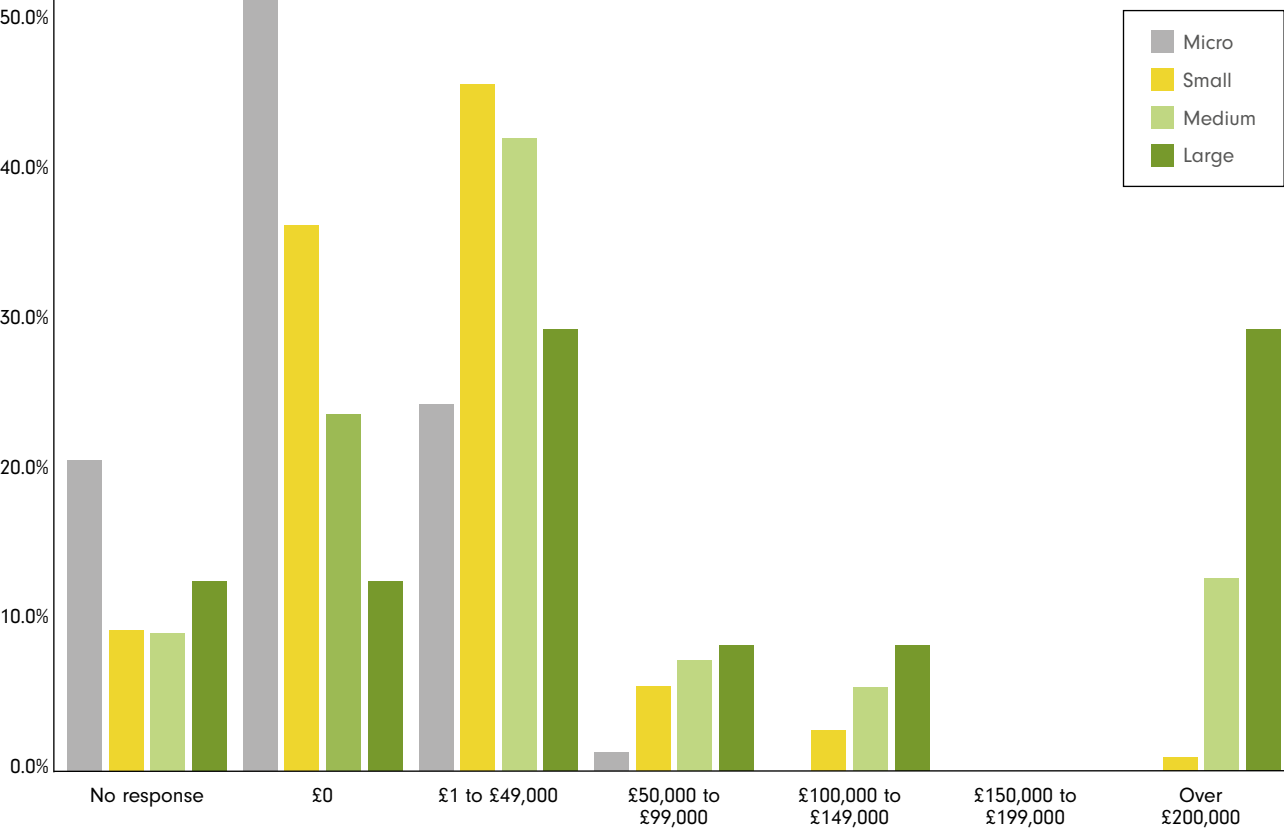
This comparative set of data shows a mixed picture across investment categories in decarbonisation in 2026 when compared with earlier periods (Figure 9).

Amid the environment of more businesses choosing not to invest in decarbonisation, there is a 2.6% reduction in the main investment category of £1-49,000 on 2025 results. Nevertheless, this category was the largest reported by a number of businesses at 33.9% in 2026. This finding is indicative of the investment levels and risks most business are prepared to acknowledge and act in support of their Net Zero commitments.

The £50-99,000 investment category is the second largest and shows a fall of 1.4% on 2025 figures. There were no investment in decarbonisation recoded at a £150-199,000 level in 2026, a drop of 0.6% on 2025 results. Figure 9: Decarbonisation by level of investment.

DECARBONISATION

Figure 10: Decarbonisation by a firm size



Close examination of the survey data reveals a link between the size of business and level of investment in decarbonisation. Larger companies outperform by volume of investment in decarbonisation, leading in the '£50 to £99,000', '£100 to £149,000' and 'over £200,000' investment categories. Smaller businesses take the lead in the '£1 to £49,000' investment category (Figure 10).

Overall, larger business showed higher levels of investment in decarbonisation compared to the 2025 position. Perhaps unsurprisingly, larger businesses dominate higher volume investment categories. The under £50K investment category is led by SMEs. This is becoming a popular choice amongst smaller businesses when considering resourcing and business support for carbon reduction.

It is concerning to see an overall reduction in the levels of investment in decarbonisation by regional businesses in 2026. In the 2025 report, improvements were reported in investment levels in SMEs and particularly in medium-sized businesses. It would be fitting to see this trend sustained in the 2026 figures. Businesses of all sizes feel less confident in supporting decarbonisation initiatives and this could impact the Net Zero policy ambition and targets in the East Midlands and nationally.

NATURE-BASED SOLUTIONS



Figure 11: Engagement of regional businesses with nature-based solutions



The study looked at levels of engagement with Nature-based Solutions (NbS) such as nature restoration and conservation projects, biodiversity enrichment, and sustainable land management. The survey respondents were asked to indicate how often their business engaged with NbS over the last 12 months (Figure 11).

A comparative analysis of 2023 -2026 survey data shows a notable increase of 6.1%, up from the 2023 level, in the number of businesses reporting varying levels of engagement with NbS. A one year increase of 9.4% from 33.7% of business in 2025 to 43.1% in 2026 has largely contributed to this trend.

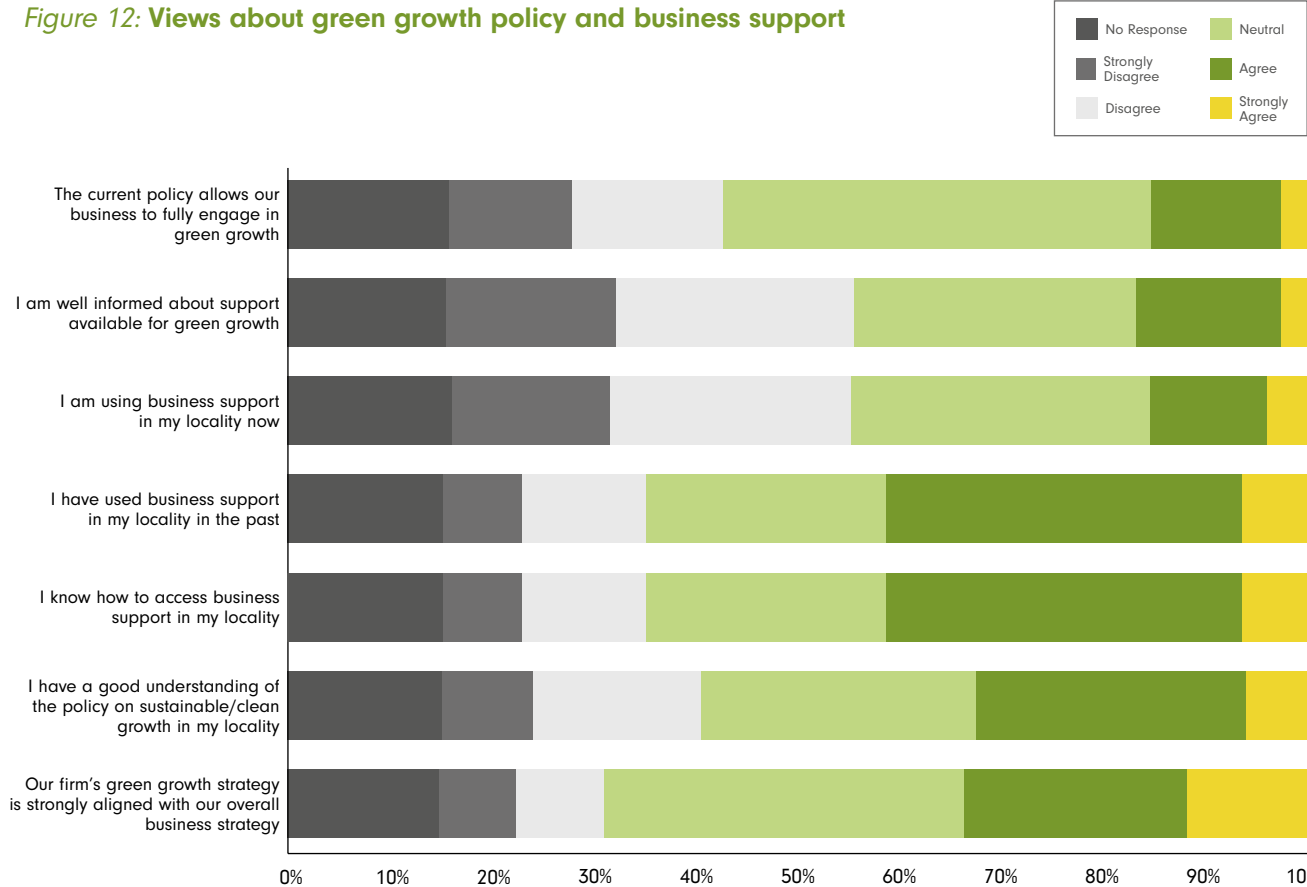
There are lifts in most NbS engagement categories: a 7.9% increase in businesses reporting they engage rarely; a 2.9% increase in businesses engaging regularly; and 1.9% in businesses engaging sometimes with NbS. However, about 41.7% of business reported they never engaged with NbS to date. This is increase of 4.2% on 45.9% of businesses in 2025.

A disparity in NbS engagement between larger and small businesses persisted in 2026 and is comparable to earlier study periods. For example, 66.7% of large businesses engage with NbS whilst 50.9% of medium-sized, 50.0% of small and only 30.4% of micro businesses are doing so. This indicates that NbS support needs of large and small businesses are likely to vary. This notable finding could inform design of Biodiversity Net Gain (BNG) targets and mechanisms to support the uptake of NbS by businesses and contribution to Local Nature Recovery Strategies.

POLICY AND SUPPORT FOR GREEN GROWTH



Figure 12: Views about green growth policy and business support



Survey participants were asked to respond to a series of statements about green growth policy and business support in the East Midlands (Figure 12).

Only 15.5% of businesses stated current policy allows their business to fully engage with green growth; a slight increase of 1.6% when compared with the 2025 survey results. This is a relatively small proportion of businesses that feel that policies support their green aspirations. This might be due to growing uncertainty about commitments of local and national government to deliver on green growth and Net Zero targets.

More businesses did not feel well informed about the support available for green growth in 2026 at 39.9% when compared with 36.5.0% in 2025 which is an increase of 3.4%. Only 17.0% of the survey respondents felt well informed about the support available for green growth in the region; a slight increase of 0.3% on 2025 results.

There has been a further decline in the number of regional businesses accessing business support in 2026. Only 15.5% of businesses reported they use business support at present, a drop of 5.1% from 21.2% of businesses that accessed support in 2025.

POLICY AND SUPPORT FOR GREEN GROWTH



There is a continued year-on-year decline in confidence levels of businesses about how to access support regionally. Over 41% of businesses were confident in their knowledge about how to access business support which represents a continued 6-year drop of 8.0% from the 2021 position.

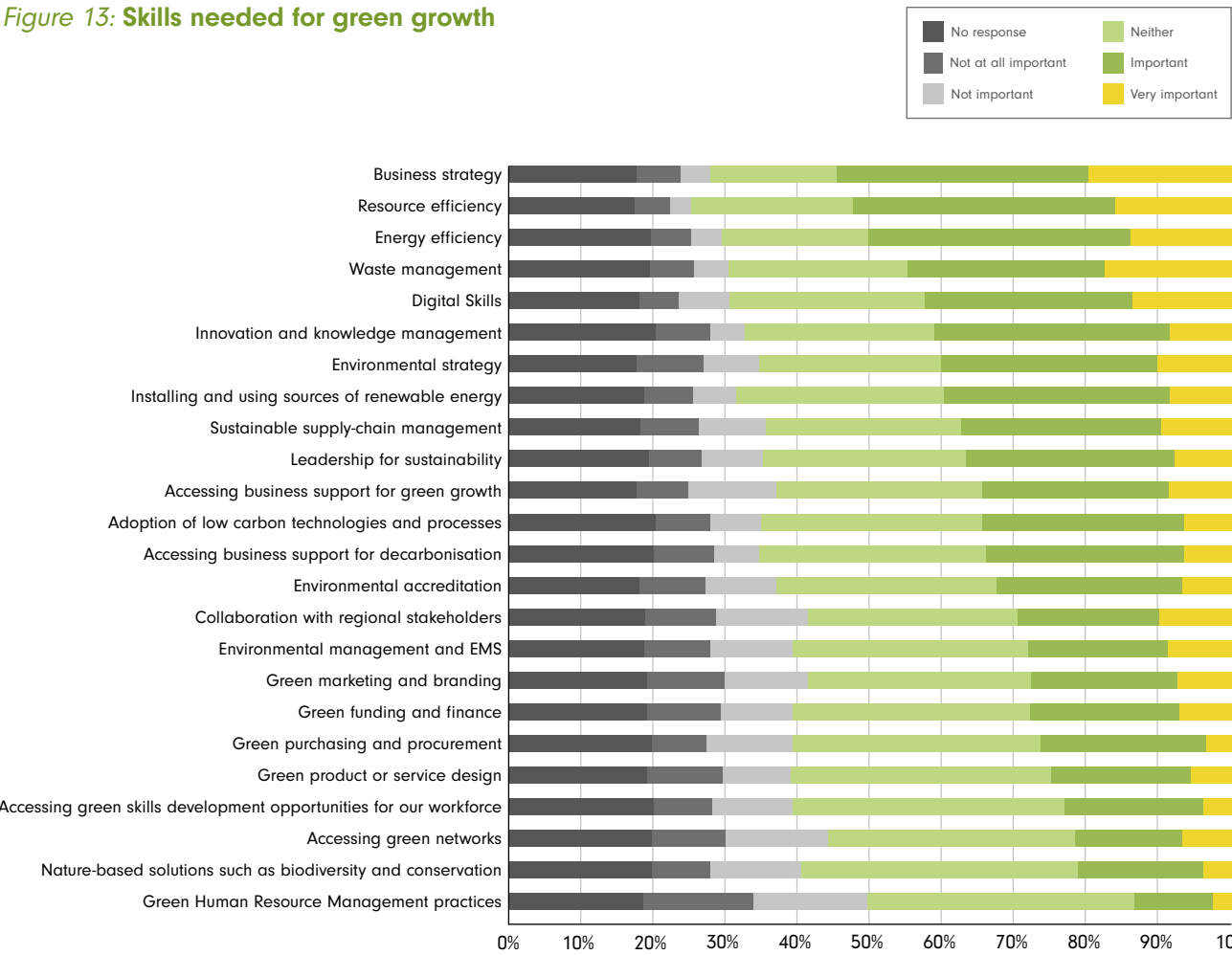
Over a third of businesses stated they have good understanding of their green growth policy. This is an increase of 1.6% on 30.9% awareness rate in 2025. Despite this improvement, policymakers and regional support agencies need to develop a co-ordinated approach to support green businesses, raise awareness of and promote engagement with pro-environmental business support more widely. There has been a 2% increase in the number of businesses reporting alignment between green growth aspirations and overall business strategy. This alignment was reported by 33.6% of businesses in 2026 compared with 31.7% of businesses in 2025. This positive development signals businesses are increasingly recognising green growth as being integral to the overall business strategy.

This integration is desirable, strengthening the capacity and capability of East Midlands businesses to contribute sustainable regional development by promoting sustained, inclusive and sustainable economic growth as per Sustainable Development Goal 8: Decent Work and Economic Growth (UN, 2015). Businesses that commit to growing sustainably invest in creating healthy workplaces and working with local communities (Public Health England, 2021). They more actively support social sustainability initiatives, including education and training for employees; sustainability and environmental impact; food waste programs; and recycling programs. Green growth is essential to power our businesses, and to prepare and transform our communities for responsible futures.

SKILLS FOR GREEN GROWTH



Figure 13: Skills needed for green growth



When asked which, of 24 listed skills areas, that business needs to strengthen and capitalise on green growth opportunities, 'efficiency-focused', 'business strategy' and 'digital skills' led the responses (Figure 13).

Energy efficiency, resource efficiency and business strategy were considered important skills to be strengthened by over a half of the East Midlands businesses (Table 1). Digital skills were required by over 44.8% of the regional businesses. Waste management skills, at 42.5%, conclude the top 5 skills needed for green growth. These results are consistent with the 2025 position. They deliver a clear message to policymakers and business support agencies about demand for skills from regional business to enable successful green growth strategies.

SKILLS FOR GREEN GROWTH



Table 1: Priority areas for skills development ranked

Skill Area	Agreement Level
1. Energy efficiency	54.6%
2. Resource efficiency	52.3%
3. Business strategy	50.3%
4. Digital Skills	44.8%
5. Waste management	42.5%
6. Innovation and knowledge management	41.1%
7. Installing and using sources of renewable energy	40.2%
8. Environmental strategy	39.7%
9. Sustainable supply-chain management	37.4%
10. Leadership for sustainability	36.8%
11. Adoption of low carbon technologies and processes and Accessing business support for green growth	34.5%
12. Accessing business support for decarbonisation	33.9%
13. Green purchasing and procurement	32.5%
14. Accessing green funding and finance	29.6%
15. Green marketing and branding	28.2%
16. Green funding and finance	27.9%
17. Green product or service design and environmental accreditation	26.4%
18. Environmental management and EMS	25.0%
19. Accessing green skills development opportunities for our workforce	23.3%
20. Nature-based solutions such as biodiversity and conservation	21.6%
21. Accessing green networks	21.3%
22. Green Human Resource Management practices	13.5%

STEM-based skills, such as energy and resource efficiency, installation and use of renewable energy sources, are in the **top 10** green skills in demand. Digital skills maintained their position in the **top 5** green skills in 2026. Similar to the 2025 position, innovation and knowledge management skills occupy 6th place.

Environmental management skills remain important for businesses to manage and minimise their environmental impact. Environmental strategy (8th place), environmental accreditation (17th place), and environmental management and EMS (19th place) are related areas of skills that are growing in demand from the regional businesses.

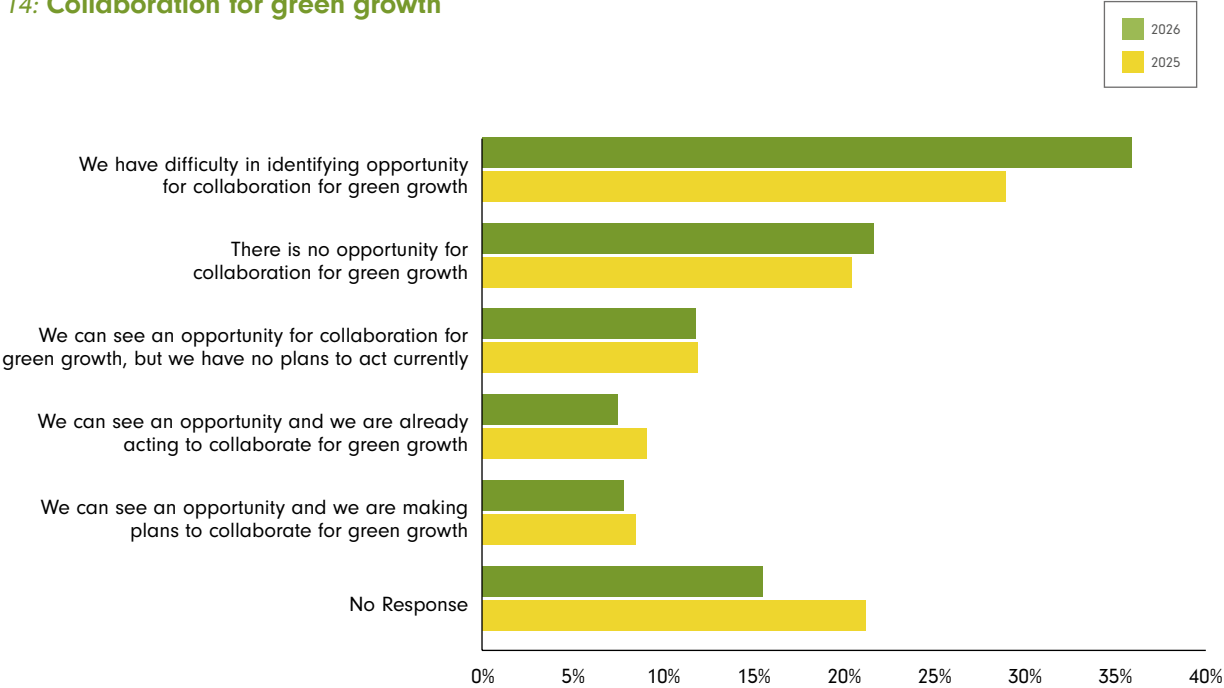
Sustainable supply chain management and leadership for sustainability remains in the top 10 green skills in demand over the last five years. This signals an intensifying engagement from the regional businesses in supply chains operating across domestic and international green market niches.

Access to business support for green growth, and business support for decarbonisation, has remained in the top 15 skills since 2022. This indicates consistent demand for training and development, knowledge and ideas exchange, and capital investment to stimulate green growth in the region.

COLLABORATION FOR GREEN GROWTH



Figure 14: Collaboration for green growth



Multi-stakeholder collaboration is an important tool for green innovation and achieving sustainable development goals (SDGs) (UN, 2015). As one of the UN SDGs, Goal 17 (Partnership for the Goals) targets strengthening of collaborative approaches and partnerships in driving and providing resolutions to sustainability challenges.

In the context of regional support for green growth, the study asked businesses to indicate a level of collaborative activity (Figure 14). The results, the first of their kind for the East Midlands, indicate that more than a third of businesses, or 35.9%, have difficulty in identifying opportunity for collaboration for green growth. This is an increase of 7.0% on the 2025 results. About 21.6% of businesses report they do not see any opportunity to collaborate for green growth; an increase of 1.2% on 2025 results.

Only 7.5% of regional businesses can identify collaborative opportunities and collaborated for green growth in 2026. This is a decline of 1.6% on 2025 position where 9.1% of regional businesses reported collaboration for green growth. Only 7.8% of businesses identified opportunities and making plans to collaborate, a decline of 0.7% on the 2025 result.

CONCLUSION

The findings of data analysis support development of the following highlights.

HIGHLIGHT 1 »

- The proportion of businesses that generated sales from green goods and services (GGS) dropped by 3.4%, from 46.2% in 2025 to 42.8% in 2026.
- The gap between businesses trading in GGS and businesses reporting ‘no turnover’ from GGS has closed and is down 0.3% from the 2025 results.
- While there has been a marginal lift in the number of businesses adopting green growth trends, there has been a 5.5% increase in businesses that have not considered green growth at all.

HIGHLIGHT 2 »

- Fewer businesses invested in decarbonisation over the last 12 months. Investment to reduce carbon has been reported by 44.5% of regional businesses – a drop of 3.6% on the 2025 results.
- Larger businesses reported higher levels of investment in decarbonisation compared to last year.
- Over a half of micro businesses said they did not invest in decarbonisation over the last 12 months.

HIGHLIGHT 3 »

- There was a further decrease in the number of businesses accessing business support in 2026.
- Only 15.5% of businesses stated they use business support locally at present, a drop of 5.7% on 2025 figures.
- Over a third of businesses integrate green growth into the core business strategy, an increase of 1.9% on the 2025 position.

HIGHLIGHT 4 »

- Demand for green skills in the areas of energy, resource efficiency, business strategy, digital and waste management has remained consistent over the last three years.
- More businesses reported engagement with nature-based solutions. 43.1% stated they engaged with NbS, an increase of 9.4% on the 2025 results.
- One in three businesses stated non-engagement with NbS in 2026.
- Over 35.9% of businesses have difficulty in identifying green growth opportunities and collaborating for green growth. Only 7.5% of businesses collaborated for green growth in 2026.

RECOMMENDATIONS

The study findings support development of the following recommendations.

GREEN GROWTH BUSINESS SUPPORT »

- As businesses report drop in access to business support for green growth, policymakers, local government and support agencies need to respond by providing effective multi-strand and multi-mode access support programmes.
- The support needs to be place-based and aligned to specifics of smaller and larger businesses.
- The scope of green growth business support needs to be broadened to reflect the 24 green skills areas discussed in this report.

DECARBONISATION »

- Strengthen the support for decarbonisation initiatives of businesses by providing grants, demonstrator consultations, expert advice supported by wide scale sector-based incentives.
- Establish support programmes for eco-innovation and green R&D specifically.
- Establish peer groups/networks where large companies support eco-innovation adoption in small businesses.

UPTAKE OF NATURE-BASED SOLUTIONS »

- Increase the number of nature-based solutions (NBS) projects and nature restoration initiatives that business can contribute to.
- Improve visibility of the NBS projects in the region.
- Develop effective pathways to encourage the uptake of NBS.
- Provide specialised support and funding for business wanting to invest in NBS and nature recovery.

COLLABORATION FOR GREEN GROWTH »

- Improve visibility of green growth collaborative opportunities in the region.
- Establish mechanisms that encourage and incentivise collaboration for green growth through funding and business support provision.

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EAST MIDLANDS CHAMBER – POLICY AND REPRESENTATION TEAM

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