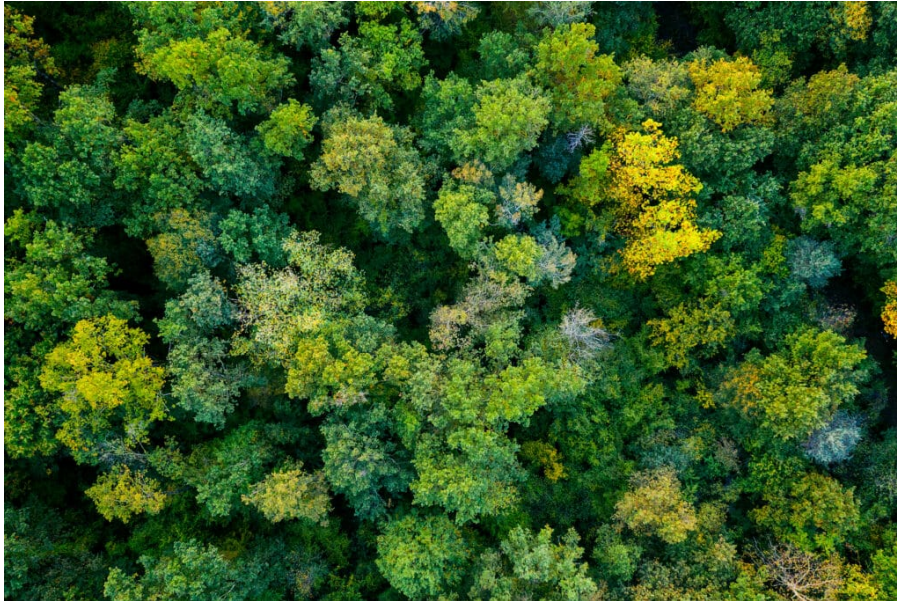


## Nine in ten European industrial SMEs say decarbonisation is crucial in addressing the climate emergency

12 months ago



New OpinionWay survey commissioned by Equans reveals the growing commitment of Europe's smaller industrial businesses to decarbonise — but also the pressing need for clearer support and simpler solutions.

Top five insights from the Equans/OpinionWay survey

- Strong awareness : 94% of European industrial leaders believe decarbonisation is compatible with their business.
- Yet limited rollout : only 43% of smaller industrial businesses have put decarbonisation plans into action.
- Main barriers : 32% say current solutions are too complex; 27% cite the scale of investment as beyond their means.
- Concrete steps taken: 92% of firms have begun shifting away from fossil fuels to lower-emission alternatives.
- Political headwinds : 59% believe recent political rhetoric is slowing their decarbonisation journey.

Across Europe, small and mid-sized industrial companies are stepping up in the face of climate change. With 80% of leaders saying their companies are closely monitoring emissions, they are working on all fronts to accelerate the transition to low-carbon operations.

Equans, a leader in energy and services, is unveiling the findings of a major new survey at the 2025 ChangeNOW Summit. Conducted by OpinionWay, the survey gathered responses from 1,336 industrial decision-makers in France, the UK, Belgium, Germany and the Netherlands. It offers an up-to-date snapshot of the current state of play in industrial decarbonisation across Europe, outlining the challenges, solutions, and ambitions of SMEs and mid-caps in the sector.

## Widespread European consensus as decarbonisation becomes embedded in the strategies of industrial SMEs and mid-caps

More than 90% of Europe's industrial leaders say that decarbonisation is compatible with their line of work, regardless of company size or location. And 87% believe it is achievable, given the available technologies.

In the UK, firms are particularly proactive: 94% of those that have started decarbonising have formalised their efforts through an official framework – well above the European average of 80%. A similar trend is seen in the Netherlands, where 91% of respondents say industrial decarbonisation is already well underway (compared to 83% Europe-wide).

Overall, 95% of companies surveyed have at least begun thinking about how to decarbonise — with many already making operational changes. Motivations vary by country, but include improving corporate reputation (58%), securing energy supply (47%) and driving innovation (46%). For 78% of respondents, this transition is being pursued collectively, through their wider industrial ecosystems.

Still, while the issue is widely discussed, fewer than half have translated ambition into concrete action.

## Industry and Europe aligned on the practical technical pathways to achieve decarbonisation

Most companies are taking a pragmatic, step-by-step approach. Energy efficiency and resource circularity stand out as the two most widely adopted strategies, with 57% implementing energy-saving initiatives and 52% reducing water and raw material consumption.

Some national differences stand out. British industrial companies are leading on energy efficiency (74%), while Belgian firms top the charts for circularity and resource reuse (73%).

When it comes to energy sources, solar and battery storage are the clear favourites, chosen by 80% of businesses that have launched decarbonisation efforts, especially larger firms. Over half have also turned to heat pumps, while smaller companies are further along in electrifying their production processes, tailoring solutions to their operational reality.

## Decarbonisation is a long-term undertaking driven by leadership conviction and in need of lasting political consistency

The main driver of decarbonisation isn't public incentives, it's environmental conviction from leadership (44%). Government incentives rank second (39%). In

France, this dynamic is even stronger, with 49% of respondents pointing to leadership, compared with just 28% citing state intervention.

Yet political and media narratives are having a real impact. More than half of leaders say that calls to slow down the transition are hampering progress in their companies. In the UK (65%) and Netherlands (66%), this perception is particularly strong. In France, the figure is lower at 52%.

This widespread concern reflects a shared view that decarbonisation is a long-term effort: 92% of decision-makers say it requires consistency over time.

## The success of the transition depends on tackling clearly identified obstacles

While the obstacles vary from country to country, certain themes emerge. At the European level, the complexity of available solutions is the most common barrier (32%), followed by the scale of investment required (27%).

In the UK, supply chain issues affecting access to low-carbon energy and bio-based materials are a major concern (38%). In France, businesses face a combination of hurdles — cost (30%), complexity (27%), and regulatory uncertainty (25%) — all of which point to a need for simplification and predictability.

Food sector businesses are notably more confident in their ability to decarbonise and stick to timelines. In contrast, companies in high-tech industries are more likely to view the process as unrealistic or more challenging than in other sectors.

Although public authorities and EU institutions are not seen as the main drivers, they are still perceived as best placed to address the structural obstacles faced by industry.

“UK SMEs are at the forefront of driving industrial decarbonisation in Europe: 94% of UK companies have formal commitments to decarbonise and over half have already taken action – notably outpacing their European counterparts. What is clear is that UK business has the ambition and appetite to lead the energy transition, yet this is being put at risk by the complexity of proposed solutions and their supply chains, as well as the shifting political sentiment toward net zero.

“As one of the few companies with extensive experience deploying low-carbon technologies across European markets, Equans is well-placed to guide technical choices and support effective installations in the UK. By drawing on proven solutions from across the continent, we help bring clarity to our customers’ decarbonisation and climate resilience plans. Our expertise and local delivery capabilities ensure we can support progress at every stage of the decarbonisation journey – turning ambition into action.” – Jean-Philippe Loiseau, CEO Equans, UK & Ireland.

“SMEs and mid-caps are innovating across the board to reduce energy consumption and decarbonise: energy management, insulation and retrofitting of buildings, electrification of processes and fleets. They are fully aware of their role and have already undertaken extensive strategic thinking. They are moving forward, but they are scaling back their ambitions due to lack of clarity around regulation and electricity prices, a lack of simple solutions, and limited access to funding. Our ability to simplify and support this momentum will be key to accelerating Europe’s industrial decarbonization.” – Jérôme Stubler, CEO d’Equans.

[The report can be found here.](#)