opinionway

FOR

EQUANS

# Industrial decarbonisation in Europe:

## France, United Kingdom, Belgium, Germany, Netherlands

Survey report – March 2025


# Methodology

# Methodology

The following statement must be included in any publication, whether complete or partial:

**"OpinionWay survey for Equans"**

and any reproduction of the survey must not be dissociated from this title

A sample of **1,336 industry decision-makers** involved in decarbonisation-related issues in their company (private-sector companies with 50 to 4999 employees), distributed as follows:

- 509 respondents from France
- 218 respondents from UK
- 201 respondents from Belgium
- 208 respondents from Germany
- 200 respondents from Netherlands

The sample was weighted depending on the **number of employees**, the **sector** and the **geographic location** to make it representative of the population surveyed.

The sample population was interviewed via the **online self-administered questionnaire using CAWI** (Computer Assisted Web Interview).

Interviews were conducted from **3 to 13 March 2025**.

OpinionWay conducted this survey in accordance with **the procedures and rules of Standard ISO 20252**

The following margins of error must be taken into account when interpreting the results of this survey:
a maximum of 3.0 points for a sample of 1,000 respondents.
a maximum of 4.4 points for a sample of 500 respondents.
a maximum of 6.9 points for a sample of 200 respondents.

# Reading note

The **significant differences between sub-targets** (sector, number of employees, etc.) are represented by the colour codes below (95% significance):

xx% ➔ significantly **higher** than the result obtained across the entire target
xx% ➔ significantly **lower** than the result obtained across the entire target

The **significant differences** (95% significance) **between the individual countries and the overall results** are indicated as follows:

→ significantly higher/lower that the results of the overall results → ***XX%*** ***XX%***

The bases shown in the report indicate **total workforce**.
The display **of the significant differences between sub-targets** has been judged and is not exhaustive. The survey's findings complement this report.


# Profile of respondents

# Profile of the industrial decision-makers

Where is your company located?

- France: **18%**
- United Kingdom: **19%**
- Belgium: **4%**
- Germany: **52%**
- Netherlands: **7%**

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| Basis: | | 509 | 218 | 201 | 208 | 200 |
| **Number of employees** | | | | | | |
| 50 to 99 employees | 24% | 35% | 24% | 37% | 19% | 24% |
| 100 to 249 employees | 57% | 47% | 59% | 42% | 61% | 59% |
| 250 to 499 employees | 8% | 7% | 6% | 8% | 10% | 7% |
| 500 to 4,999 employees | 11% | 11% | 11% | 13% | 10% | 10% |
| **Business sector** | | | | | | |
| **Industry** | 74% | 71% | 72% | 71% | 77% | 70% |
| Construction, building trade | 20% | 24% | 23% | 24% | 16% | 26% |
| Energy | 6% | 5% | 5% | 5% | 7% | 4% |
| Extractive industry | 2% | 5% | 2% | <1% | 1% | 3% |
| Agrifood | 11% | 11% | 2% | 5% | 16% | 8% |
| High tech | 16% | 14% | 37% | 6% | 10% | 8% |
| Health and biotech | 6% | 7% | 8% | 7% | 5% | 7% |
| Chemicals | 9% | 9% | 6% | 7% | 9% | 12% |
| Transport and logistics | 9% | 10% | 8% | 12% | 6% | 30% |
| Automotive | 11% | 11% | 7% | 21% | 12% | 7% |
| Metallurgy | 20% | 18% | 2% | 24% | 29% | 7% |
| Telecommunications | 4% | 4% | 6% | 5% | 4% | 6% |
| Another industry sector | 12% | 11% | 22% | 13% | 8% | 12% |

# Profile of the industrial decision-makers

| Role in decarbonisation-related decisions | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| Basis: | | 509 | 218 | 201 | 208 | 200 |
| Main decision-maker | 54% | 44% | 72% | 46% | 51% | 58% |
| Co-decision-maker | 38% | 41% | 26% | 38% | 41% | 39% |
| Consulted but not decision-maker | 8% | 15% | 2% | 16% | 8% | 3% |
| Not involved in these decisions | - | - | - | - | - | - |
| **Department** | | | | | | |
| CEO/Managing Director/Owner/General Manager | 22% | 17% | 41% | 21% | 18% | 16% |
| General management | 17% | 24% | 12% | 20% | 16% | 15% |
| Strategic management | 6% | 8% | 4% | 16% | 4% | 11% |
| CSR department | 4% | 4% | 2% | 6% | 3% | 14% |
| Administrative and financial department | 4% | 6% | 4% | 4% | 2% | 8% |
| Plant management | 4% | 9% | 1% | 5% | 2% | 4% |
| Department of operations | 12% | 11% | 6% | 13% | 15% | 17% |
| Logistics/supply chain department | 4% | 6% | 1% | 4% | 4% | 7% |
| IT department | 12% | 4% | 24% | 4% | 12% | 2% |
| Safety/QHSE department | 3% | 3% | 2% | 1% | 4% | <1% |
| Purchasing department | 2% | 2% | <1% | 2% | 3% | <1% |
| Technology / R&D | 3% | 2% | 2% | <1% | 5% | <1% |
| Industrial maintenance department | 5% | 1% | - | 2% | 9% | 4% |
| Legal/compliance department | <1% | 1% | <1% | - | - | - |
| Human resources department | 2% | 1% | 1% | <1% | 3% | 2% |
| Other | <1% | 1% | - | 2% | <1% | <1% |


# Results

01

# Perception of industrial decarbonisation

# Definition of decarbonisation

**Decarbonisation** is defined in the Cambridge English Dictionary as “the process of stopping or reducing carbon gases, especially carbon dioxide, being released into the atmosphere as the result of a process, for example the burning of fossil fuels)”.

There are several pathways for decarbonisation, and they can be combined:

- Adopting an energy-efficient and energy-saving approach by reducing the amount of energy consumed for the same work, or only meeting essential needs that are deemed non-negotiable
- Storing and reusing energy in order to limit energy consumption
- Replacing fossil fuels with solutions that emit fewer greenhouse gases
- Reducing the consumption of raw materials, and reusing and recycling waste as much as possible
- Using carbon-capture techniques to prevent carbon dioxide from being released into the atmosphere

# Although polluting, the European industrial sector *pays close attention to its emissions and is striving to reduce its impact* – a particularly popular opinion in the United Kingdom. In the Netherlands, almost all industrial companies state that the sector always favours decarbonised solutions. In Belgium too, people are more convinced that the industrial sector systematically favours low-carbon solutions and therefore perceive it as a lower $CO_2$ emitter.

Q1: To what extent do you agree with the following statements? Today, the industrial sector…

*Basis: all decision-makers (1336)*

| | | | France | | United Kingdom | | Belgium | | Germany | | Netherlands | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | *Basis:* | *509* | | *218* | | *201* | | *208* | | *200* | |
| | **Completely agree** | **Total respondents that agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** |
| emits a lot of carbon dioxide ($CO_2$) | **43%** | **85%** | *34%* | **85%** | *56%* | **89%** | *21%* | **76%** | *43%* | **84%** | *40%* | **87%** |
| pays close attention to its carbon dioxide ($CO_2$) emissions | **33%** | **80%** | *35%* | **77%** | *45%* | **88%** | *29%* | **85%** | *28%* | **76%** | *38%* | **86%** |
| relies on a circular economy as much as possible | **33%** | **80%** | *25%* | **75%** | *46%* | **82%** | *35%* | **86%** | *29%* | **80%** | *37%* | **81%** |
| always favours decarbonised solutions | **30%** | **75%** | *31%* | **69%** | *40%* | **78%** | *41%* | **79%** | *25%* | **73%** | *34%* | **92%** |
| captures a large amount of the carbon dioxide ($CO_2$) it emits | **32%** | **72%** | *25%* | **67%** | *35%* | **73%** | *32%* | **84%** | *32%* | **71%** | *34%* | **78%** |

Country results higher than the entire target

Country results lower than the entire target

# European leaders in the *high-tech sector*, who are much more categorical than the average on the negative externalities of the industrial sector, are also more categorical in recognising the positive actions taken to mitigate their effects.

Q1: To what extent do you agree with the following statements? Today, the industrial sector…

*Basis: all decision-makers (1336)*

| | Completely agree | Total respondents that agree | High tech – Completely agree | High tech – Total Agree |
|---|---|---|---|---|
| Basis: | | | 114 | |
| emits a lot of carbon dioxide ($CO_2$) | 43% | 85% | 62% | 93% |
| pays close attention to its carbon dioxide ($CO_2$) emissions | 33% | 80% | 61% | 90% |
| relies on a circular economy as much as possible | 33% | 80% | 58% | 89% |
| always favours decarbonised solutions | 30% | 75% | 49% | 79% |
| captures a large amount of the carbon dioxide ($CO_2$) it emits | 32% | 72% | 46% | 76% |

# Industrial decarbonisation appears transversely as a real *environmental necessity*, even in Belgium and the Netherlands where leaders are more reserved about the measure.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry…

*Basis: all decision-makers (1336)*

| | | | France | | United Kingdom | | Belgium | | Germany | | Netherlands | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | *Basis:* | *509* | | *218* | | *201* | | *208* | | *200* | |
| | **Completely agree** | **Total respondents that agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** |
| is necessary to respond to the climate emergency | **58%** | **90%** | *55%* | **90%** | *75%* | **94%** | *41%* | **88%** | *55%* | **88%** | *41%* | **91%** |

Country results higher than the entire target
Country results lower than the entire target

Undeniably valued, decarbonisation is creating *even more momentum in the United Kingdom*. This has been made possible because companies have a *clear vision* of the applicable solutions, it can generate *many positive impacts on the sector,* in particular when it comes to *innovation*. In the Netherlands, industrial companies are almost unanimous about the ability of the transition *to improve overall performance*.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry…

*Basis: all decision-makers (1336)*

| | | | France | | United Kingdom | | Belgium | | Germany | | Netherlands | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | *Basis:* | *509* | | *218* | | *201* | | *208* | | *200* | |
| | **Completely agree** | **Total respondents that agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** |
| drives companies in the sector to innovate more | 45% | 94% | *41%* | **93%** | *62%* | **95%** | *47%* | **88%** | *40%* | **94%** | *36%* | **91%** |
| is possible because the applicable solutions are known | 38% | 87% | *34%* | **88%** | *52%* | **90%** | *31%* | **87%** | *35%* | **86%** | *31%* | **91%** |
| improves the sector's appeal | 42% | 86% | *37%* | **87%** | *51%* | **95%** | *36%* | **82%** | *42%* | **83%** | *38%* | **90%** |
| boosts the sector's independence with respect to other countries | 37% | 86% | *34%* | **84%** | *49%* | **93%** | *29%* | **83%** | *33%* | **83%** | *38%* | **89%** |
| is a step that is already well underway | 31% | 83% | *28%* | **75%** | *41%* | **86%** | *26%* | **82%** | *28%* | **82%** | *33%* | **91%** |
| improves the performance of industry | 35% | 80% | *32%* | **84%** | *56%* | **89%** | *30%* | **75%** | *27%* | **74%** | *43%* | **90%** |

Country results higher than the entire target

Country results lower than the entire target

## There is momentum for this in the United Kingdom that is shared by *high-tech* companies, contrary to companies in the *metallurgy* sector. Within the largest structures surveyed, there is a consensus on the climate emergency and the relevance of this approach.

Q2: Do you agree with each of the following statements regarding decarbonisation of industry in general? Decarbonising industry…

*Basis: all decision-makers (1336)*

| | | | High tech | | Metallurgy | | 500 to 4,999 employees | |
|---|---|---|---|---|---|---|---|---|
| | | Basis: | 114 | | 120 | | 478 | |
| | Completely agree | Total respondents that agree | Completely agree | Total Agree | Completely agree | Total Agree | Completely agree | Total Agree |
| drives companies in the sector to innovate more | 45% | 94% | 63% | 95% | 36% | 91% | 51% | 94% |
| is necessary to respond to the climate emergency | 58% | 90% | 83% | 96% | 55% | 87% | 67% | 96% |
| is possible because the applicable solutions are known | 38% | 87% | 55% | 91% | 21% | 75% | 43% | 89% |
| improves the sector's appeal | 42% | 86% | 48% | 90% | 37% | 74% | 55% | 92% |
| boosts the sector's independence with respect to other countries | 37% | 86% | 56% | 91% | 25% | 76% | 43% | 92% |
| is a step that is already well underway | 31% | 83% | 59% | 90% | 20% | 72% | 36% | 84% |
| improves the performance of industry | 35% | 80% | 49% | 81% | 24% | 63% | 46% | 91% |

Results from sub-targets higher than the entire target
Results from sub-target lower than the entire target

However, *its implementation takes time*, as it is relatively more difficult in this industry than in other sectors and represents too great a financial burden. Companies in the United Kingdom are significantly more divided on this last point, unlike in the Netherlands (where 2/3 of companies would go as far as to say that industrial decarbonisation is a pipe dream).

Q3: Using the same scale, do you agree with these statements? Industrial decarbonisation…

*Basis: all decision-makers (1336)*

| | Completely agree | Total respondents that agree | France Completely agree | France Total Agree | United Kingdom Completely agree | United Kingdom Total Agree | Belgium Completely agree | Belgium Total Agree | Germany Completely agree | Germany Total Agree | Netherlands Completely agree | Netherlands Total Agree |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Basis: | | | 509 | | 218 | | 201 | | 208 | | 200 | |
| is a long-term project | 52% | 92% | 40% | 91% | 61% | 97% | 41% | 84% | 54% | 91% | 45% | 86% |
| is harder than decarbonising other sectors | 31% | 72% | 26% | 71% | 32% | 70% | 32% | 84% | 31% | 71% | 33% | 78% |
| represents too great a financial burden | 30% | 72% | 24% | 72% | 25% | 58% | 25% | 75% | 34% | 76% | 37% | 85% |
| is an issue you are fed up of hearing about | 20% | 50% | 20% | 50% | 22% | 48% | 19% | 48% | 19% | 50% | 23% | 59% |
| is a pipe dream | 21% | 48% | 17% | 44% | 28% | 47% | 13% | 47% | 21% | 48% | 21% | 65% |

Country results higher than the entire target

Country results lower than the entire target

# Bucking the trend, agrifood companies are significantly more confident when it comes to the implementation of the industrial decarbonisation process and its timeline. In the high-tech field, there are still some doubts—more than elsewhere, a significant number of people see the task as both difficult and a pipe dream.

Q3: Using the same scale, do you agree with these statements? Decarbonising industry…

*Basis: all decision-makers (1336)*

| | Completely agree | Total respondents that agree | Agrifood | | High tech | |
|---|---|---|---|---|---|---|
| *Basis:* | | | *51* | | *114* | |
| | | | *Completely agree* | **Total Agree** | *Completely agree* | **Total Agree** |
| is a long-term project | 52% | 92% | *55%* | **76%** | *63%* | **98%** |
| is harder than decarbonising other sectors | 31% | 72% | *13%* | **32%** | *47%* | **80%** |
| represents too great a financial burden | 30% | 72% | *20%* | **67%** | *34%* | **73%** |
| is an issue you are fed up of hearing about | 20% | 50% | *3%* | **25%** | *33%* | **57%** |
| is a pipe dream | 21% | 48% | *3%* | **28%** | *48%* | **61%** |

Results from sub-targets higher than the entire target

Results from sub-target lower than the entire target

*Undeniably a priority for the government and for their company*, for many leaders, decarbonisation is seen as a subject that is equally important for *the whole sector*. The French minimise the importance of industrial decarbonisation for suppliers, while the Netherlands highlight the importance of the transition for their clients.

Q4: How important do you think decarbonisation of industry is today for each of the following stakeholders?

*Basis: all decision-makers (1336)*

| | Total | | France | | United Kingdom | | Belgium | | Germany | | Netherlands | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Basis: | | | 509 | | 218 | | 201 | | 208 | | 200 | |
| | **Number-one priority** | **High priority** | Number-one priority | **High priority** | Number-one priority | **High priority** | Number-one priority | **High priority** | Number-one priority | **High priority** | Number-one priority | **High priority** |
| For the government (with regard to the industrial sector) | 31% | 72% | 26% | 66% | 42% | 77% | 20% | 63% | 31% | 72% | 25% | 81% |
| For your company | 28% | 72% | 30% | 75% | 33% | 81% | 31% | 70% | 24% | 67% | 34% | 70% |
| For companies in the sector | 24% | 65% | 21% | 62% | 30% | 74% | 18% | 66% | 22% | 61% | 30% | 75% |
| For your investors | 23% | 60% | 20% | 59% | 31% | 62% | 22% | 67% | 20% | 58% | 29% | 66% |
| For your clients | 22% | 60% | 22% | 61% | 25% | 62% | 21% | 66% | 21% | 58% | 27% | 74% |
| For your suppliers | 18% | 60% | 15% | 51% | 24% | 66% | 23% | 56% | 15% | 60% | 19% | 61% |
| For your employees | 18% | 56% | 21% | 64% | 26% | 62% | 24% | 64% | 14% | 52% | 21% | 53% |

Country results higher than the entire target
Country results lower than the entire target

opinionway FOR EQUANS

# Almost half of all companies in the high-tech sector consider the issue to be a top priority, this distinguishes them from the average company, as well as their customers and investors.

Q4: How important do you think decarbonisation of industry is today for each of the following stakeholders?

*Basis: all decision-makers (1336)*

| | Number-one priority | High priority | High tech: Number-one priority | High tech: High priority |
|---|---|---|---|---|
| *Basis:* | | | *114* | |
| For the government (with regard to the industrial sector) | 31% | 72% | *38%* | **74%** |
| For your company | 28% | 72% | *47%* | **75%** |
| For companies in the sector | 24% | 65% | *32%* | **69%** |
| For your investors | 23% | 60% | *40%* | **61%** |
| For your clients | 22% | 60% | *40%* | **75%** |
| For your suppliers | 18% | 60% | *28%* | **67%** |
| For your employees | 18% | 56% | *20%* | **60%** |



Results from sub-targets higher than the entire target

02

# Perception of decarbonisation within the company

# Whatever the country or the size of the small company, more than 9 out of 10 industrial companies in Europe believe that the *issue of decarbonisation is compatible with their company's business*! Only professionals in the metallurgy sector are slightly less convinced.

Q5: Is the issue of decarbonisation compatible with your company's business?

*Basis: all decision-makers (1336)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *509* | *218* | *201* | *208* | *200* |
| **Total yeses** | **94%** (Metallurgy: 84%) | **92%** | **97%** | **96%** | **93%** | **97%** |
| Yes, very much so | **43%** | 38% | 48% | 40% | 43% | 41% |
| Yes, somewhat | **51%** | 54% | 49% | 56% | 50% | 56% |
| No, not really | **6%** | 7% | 3% | 4% | 7% | 2% |
| No, not at all | **<1%** | 1% | <1% | - | - | 1% |

Beyond the participation in the environmental transition and compliance with laws, leaders are able to identify the advantages of decarbonising their company. Most importantly, they believe that it would improve the *reputation of their company* - a belief shared by slightly fewer leaders in the Netherlands. It would also help to secure resource and energy supplies and stimulate innovation. The search for a competitive advantage might be more present in the UK than in France.

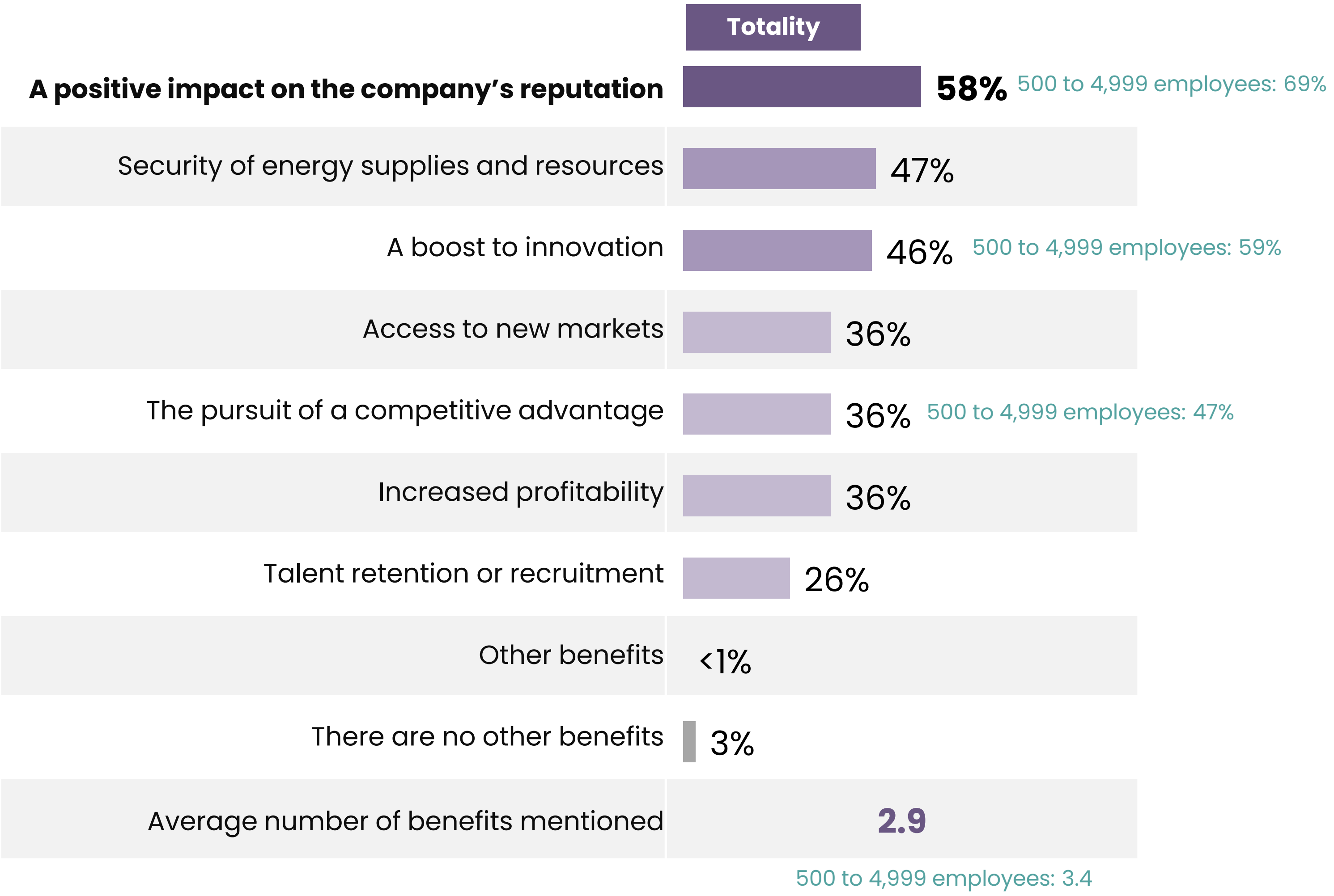
Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *509* | *218* | *201* | *208* | *200* |
| **A positive impact on the company's reputation** | **58%** | **59%** | **62%** | **57%** | **58%** | **48%** |
| Security of energy supplies and resources | 47% | 41% | 54% | 39% | 47% | 42% |
| A boost to innovation | 46% | 40% | 49% | 51% | 47% | 40% |
| Access to new markets | 36% | 36% | 42% | 39% | 34% | 36% |
| The pursuit of a competitive advantage | 36% | 29% | 46% | 33% | 35% | 32% |
| Increased profitability | 36% | 31% | 42% | 26% | 36% | 31% |
| Talent retention or recruitment | 26% | 23% | 25% | 27% | 27% | 29% |
| Other benefits | <1% | <1% | - | <1% | - | - |
| There are no other benefits | 3% | 3% | <1% | 1% | 4% | 2% |
| Average number of benefits mentioned | **2.9** | 2.7 | 3.2 | 2.8 | 3.0 | 2.6 |

Country results lower than the entire target

# The largest structures surveyed are able to identify the benefits even better.

Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*



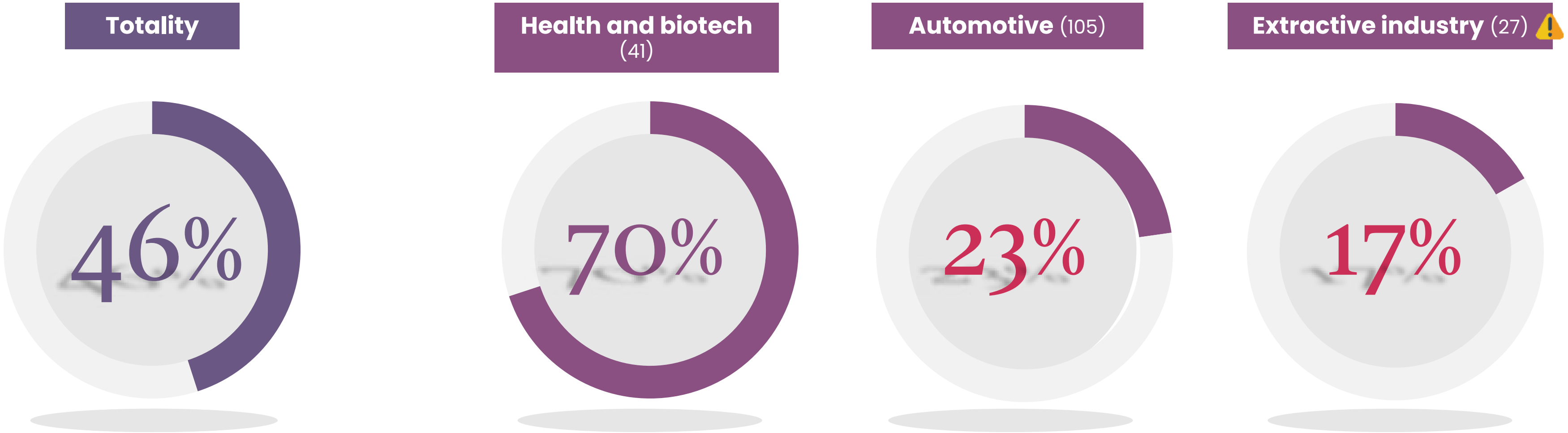



Results from sub-targets higher than the entire target

# Decarbonisation as a vector for stimulating innovation within the company - a polarising idea? Health and biotech industries tend to celebrate decarbonisation, while the automotive and extractive industries remain more sceptical.

Q6: Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company? *Basis: all decision-makers (1336)*

*Small base, results to be interpreted with caution* ⚠️




Think that **decarbonisation would stimulate innovation within their company**



Results from sub-target lower than the entire target

Even though *no major obstacle emerges*, the complexity of the proposed solutions comes in first place when talking about obstacles at a European level. The magnitude of the investments required is another one of the most mentioned obstacles. It is important to note here that companies in the *Netherlands feel less constrained* by these 2 notions. In the United Kingdom in particular, the complexity of the supply chain for decarbonised energies or biosourced materials is an even bigger problem.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

*Basis: all decision-makers (1336)*

| | Totality | | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|---|
| | | *Basis:* | *509* | *218* | *201* | *208* | *200* |
| The complexity of the proposed solutions | 32% | | 27% | 39% | 21% | 34% | 16% |
| The required investments exceeding your company's means | 27% | | 30% | 25% | 26% | 29% | 14% |
| A lack of suitable infrastructure for the energy transition | 25% | 500 to 4,999 employees: 34% | 19% | 28% | 28% | 26% | 24% |
| The administrative and regulatory complexity | 25% | | 25% | 27% | 22% | 25% | 24% |
| The complexity of the supply chain for decarbonised energy or biobased materials | 25% | | 23% | 38% | 16% | 22% | 20% |
| The difficulty of finding channels for collecting, recycling and reusing materials that are suited to your needs | 23% | | 24% | 32% | 26% | 20% | 23% |
| A lack of in-house skills for going through with the transition successfully | 21% | | 19% | 24% | 27% | 21% | 19% |
| The difficulty of assessing the actual risk-benefit ratio of the transformation | 21% | | 21% | 24% | 21% | 20% | 16% |

*Other possible responses on the next slide...*

Country results higher than the entire target

Country results lower than the entire target

Results from sub-targets higher than the entire target

# Specifically in the extractive industry, the main obstacles to decarbonisation are the lack of support from financial backers and the difficulty in choosing a service provider to support them through this process: these obstacles are not mentioned particularly frequently on the whole.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

*Basis: all decision-makers (1336)*

*... Other possible responses on the previous slide*

| | Totality | | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|---|
| | | Basis: | 509 | 218 | 201 | 208 | 200 |
| A lack of solutions for your business needs | 21% | | 20% | 18% | 17% | 23% | 15% |
| A fear of jeopardising the quality of products/services | 20% | | 19% | 27% | 20% | 17% | 26% |
| A lack of support on the part of your funders | 20% | Extractive industry: 47% | 24% | 19% | 18% | 18% | 21% |
| The difficulty of choosing a provider to support you in the process | 19% | Extractive industry: 40% | 21% | 21% | 15% | 18% | 13% |
| Resistance to change on the part of your shareholders | 17% | | 18% | 13% | 12% | 18% | 19% |
| The difficulty of getting your teams to follow new models | 15% | | 14% | 17% | 20% | 15% | 12% |
| A lack of differentiation in the eyes of your clients | 13% | | 12% | 13% | 12% | 13% | 12% |
| Other obstacles | <1% | | - | <1% | 3% | - | 2% |
| There are no obstacles | 3% | | 2% | 3% | <1% | 4% | 1% |

Country results higher than the entire target

Results from sub-targets higher than the entire target

# Players in the agrifood industry are mainly bio sourced held back by the complexity of the proposed solutions, while in the health and biotech sector, the first obstacle for many companies is the difficulty in evaluating the specific risk-benefit ratio of the transformation.

Q7: And what are, or what would be, **the obstacles to decarbonisation** for your company?

*Basis: all decision-makers (1336)*

| | Totality | Agrifood | Health and biotech |
|---|---|---|---|
| Basis: | | 51 | 41 |
| The complexity of the proposed solutions | 32% | **57%** | 21% |
| The required investments exceeding your company's means | 27% | 43% | 13% |
| A lack of suitable infrastructure for the energy transition | 25% | 18% | 31% |
| The administrative and regulatory complexity | 25% | 45% | 13% |
| The complexity of the supply chain for decarbonised energy or biobased materials | 25% | **4%** | 37% |
| The difficulty of finding channels for collecting, recycling and reusing materials that are suited to your needs | 23% | 6% | 33% |
| A lack of in-house skills for going through with the transition successfully | 21% | 17% | 13% |
| The difficulty of assessing the actual risk-benefit ratio of the transformation | 21% | 15% | **48%** |

Results from sub-targets higher than the entire target
Results from sub-target lower than the entire target

03

# Decarbonisation measures in the company

Even though the subject *is discussed in almost all industries*, less than half of all companies have passed the discussion stage and have started to implement decarbonisation measures. Even though companies in the Netherlands find that the sector favours more decarbonised solutions than in Europe in general, industrial companies consider themselves to be less advanced when it comes to decarbonisation strategies.

Q8: In concrete terms, what stage is your company at in respect of decarbonisation?

*Basis: all decision-makers (1336)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| Basis: | | 509 | 218 | 201 | 208 | 200 |
| **Fully operational or in deployment** | **43%** | **36%** | **53%** | **34%** | **43%** | **30%** |
| It has completed its decarbonisation | 11% | 11% | 16% | 9% | 10% | 2% |
| It has started to implement decarbonisation measures | 32% | 25% | 37% | 25% | 33% | 28% |
| It has set itself specific targets | 28% | 30% | 24% | 27% | 30% | 21% |
| It has started to give it some initial consideration | 24% | 29% | 19% | 35% | 21% | 35% |
| It still hasn't considered the issue | 5% | 5% | 4% | 4% | 6% | 14% |

Country results higher than the entire target
Country results lower than the entire target

# 1 in 10 companies has completed its decarbonisation, a proportion that *doubles* in the high-tech sector. The agrifood industry also stands out with how *advanced* it is on this subject.

Q8: In concrete terms, what stage is your company at in respect of decarbonisation?

*Basis: all decision-makers (1336)*

| | Totality | Agrifood | High tech |
|---|---|---|---|
| *Basis:* | | *51* | *114* |
| **Fully operational or in deployment** | **43%** | **66%** | **56%** |
| It has completed its decarbonisation | **11%** | 14% | **22%** |
| It has started to implement decarbonisation measures | **32%** | 52% | 34% |
| It has set itself specific targets | **28%** | 21% | **14%** |
| It has started to give it some initial consideration | **24%** | 6% | 23% |
| It still hasn't considered the issue | **5%** | 7% | 7% |

Results from sub-targets higher than the entire target
Results from sub-target lower than the entire target

Companies that are already fully operational or in deployment

# It is primarily the *environmental convictions of leaders* that motivates them to take action within their companies. In France, *players involved in decarbonisation* stand out because of their remarkable effectiveness, while the government tends to be less of a driving force.

Q11: What or who prompted your company to implement decarbonisation measures?

*Basis: Decision-makers that have already implemented decarbonisation measures (530)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *175* | *118* | *76* | *94* | *67* |
| **Your company management** | **44%** | 49% | 51% | 42% | 40% | 44% |
| The government | 39% | 28% | 43% | 54% | 40% | 35% |
| The geopolitical situation | 34% (500 to 4,999 employees: 49%) | 32% | 30% | 35% | 36% | 25% |
| The competition | 30% | 29% | 28% | 30% | 32% | 26% |
| Your investors | 29% | 23% | 33% | 32% | 30% | 12% |
| Your current or future employees | 28% | 28% | 31% | 25% | 28% | 14% |
| "Conventional" suppliers (not those already involved in decarbonisation) | 27% | 19% | 21% | 31% | 32% | 19% |
| Your customers or potential customers | 25% | 30% | 30% | 33% | 23% | 11% |
| Players already involved in decarbonisation | 25% | 42% | 27% | 24% | 20% | 23% |
| Other actors | <1% | - | - | - | 1% | - |
| Average number of quotes | **2.8** | 2.8 | 2.9 | 3.1 | 2.8 | 2.1 |

Country results higher than the entire target

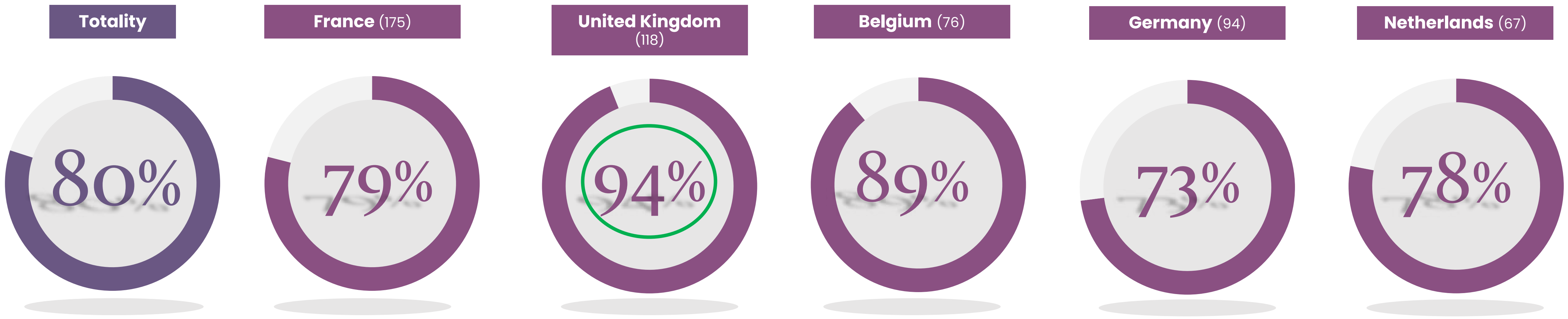
Country results lower than the entire target

Results from sub-targets higher than the entire target

*8 out of 10 companies have officially formalised their commitment* to decarbonisation, more than 9 out of 10 in the United Kingdom. However, in the metallurgy sector this figure drops to just 5 out of 10 companies.

Q14: Finally, has your company officially formalised its commitment to decarbonisation (corporate purpose, master plan, approved trajectory)?

*Basis: Decision-makers that have already implemented decarbonisation measures (530)*




Metallurgy: 53%

Has formalised **its commitment to decarbonisation in the form of an official commitment**

**Companies that are already fully operational or in deployment**

Country results higher than the entire target

# An *energy-efficient and energy-saving approach* on the one hand, *reduction in consumption and circularity* on the other: these are the pillars of decarbonisation for European industries. Companies in the United Kingdom and Belgium (respectively) in particular stand out due to their advanced positions when it comes to these two issues.

Q9: What type(s) of measure has your company implemented?

*Basis: Decision-makers that have already implemented decarbonisation measures (530)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *175* | *118* | *76* | *94* | *67* |
| Adopted an energy-efficient and energy-saving approach | **57%** | **53%** | **74%** | **47%** | **52%** | **47%** |
| Reduced consumption of water and raw materials and improved circularity as much as possible | **52%** | **49%** | **46%** | **73%** | **54%** | **62%** |
| Replacing fossil fuels with solutions that emit fewer greenhouse gases | **40%** | 46% | 44% | 34% | 38% | 28% |
| Storing and reusing energy in order to limit energy consumption | **39%** | 32% | 46% | 45% | 37% | 52% |
| Using carbon-capture techniques to prevent carbon dioxide from being released into the atmosphere | **38%** | 28% | 35% | 48% | 41% | 37% |
| Average number of types of measures mentioned | **2.3** ISE: 2.7 | 2.1 | 2.4 | 2.5 | 2.2 | 2.3 |

**Companies that are already fully operational or in deployment**

Country results higher than the entire target

Results from sub-targets higher than the entire target

## *Solar power and storage* are the most popular options for replacing all or some fossil fuels used. At the same time, half of these structures favour *heat pumps*. Smaller ISEs tend to opt for the electrification of processes, which is much more widespread.

Q9bis: What solution(s) have you chosen to replace all or some of the fossil fuels you use?

*Basis: Decision-makers that have already replaced fossil fuels with solutions that emit fewer greenhouse gases (229)*

*Small base, results to be interpreted with caution ⚠️*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| Basis: | | 84 | 59 | 28 ⚠️ | 39 | 19 ⚠️ |
| **Total Use of heat solutions** | **95%** | **92%** | **92%** | **100%** | **98%** | **91%** |
| Heat pump | 54% | 53% | 40% | 74% | 61% | 51% |
| Geothermal | 35% | 30% | 24% | 10% | 45% | 20% |
| Waste heat recovery | 28% | 10% | 28% | 46% | 33% | 33% |
| Hydrogen | 21% | 23% | 17% | 17% | 22% | 12% |
| Electric boiler | 14% | 12% | 29% | 14% | 6% | 18% |
| Another heat solution | 2% | 5% | 1% | - | 2% | - |
| **Total Solutions for renewable energy production** | **92%** | **96%** | **100%** | **100%** | **85%** | **100%** |
| Solar and storage (battery) | 80% | 88% | 79% | 60% | 79% | 94% |
| Wind | 28% | 10% | 34% | 49% | 30% | 45% |
| Another renewable energy | 11% | 13% | 6% | 2% | 14% | 1% |
| **Electrification of processes** (electric furnaces for example.) | **7%** 250 to 499 employees: 28% | 11% | 10% | 13% | 5% | 10% |
| Other solutions | 6% | 8% | 1% | 9% | 8% | - |
| Average number of solutions cited | **2.9** 250 to 499 employees: 3.5 | 2.6 | 2.7 | 2.9 | 3.0 | 2.8 |

**Companies that are already fully operational or in deployment**

Country results lower than the entire target

Results from sub-targets higher than the entire target

## To meet their decarbonisation goals, industrial players are implementing a wide range of practical measures. The most adopted initiatives focus on waste management, from collection through to recovery and reuse.

Q10: And more specifically, at what level(s) has your company implemented these measures?

*Basis: Decision-makers that have already implemented decarbonisation measures (530)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *175* | *118* | *76* | *94* | *67* |
| Reduction of industrial waste, and solutions for collecting, recycling and reusing materials | 52% | 45% | 53% | 58% | 51% | 64% |
| Optimisation of energy management | 43% | 45% | 54% | 32% | 37% | 51% |
| Decarbonisation of processes: production chain, equipment, recycling and reuse of materials | 38% | 40% | 41% | 46% | 37% | 31% |
| Optimisation of the logistics chain | 34% | 36% | 30% | 29% | 36% | 30% |
| Use of digital tools for smart management of buildings and processes | 33% | 23% | 37% | 39% | 34% | 33% |
| Insulation and thermal renovation of buildings | 32% | 36% | 30% | 35% | 30% | 43% |
| Electrification of the vehicle fleet | 31% | 31% | 26% | 36% | 32% | 49% |
| Product design: eco-design, use of biobased materials, lifecycle of materials | 26% | 37% | 28% | 37% | 22% | 13% |
| *Other actions implemented* | | | | | | |
| Optimisation of water management | 43% | 38% | 40% | 51% | 45% | 36% |
| Cooperation with your suppliers and providers | 25% | 23% | 41% | 27% | 17% | 34% |
| Average number of quotes | **3.6** | 3.5 | 3.8 | 3.9 | 3.4 | 3.8 |

**Companies that are already fully operational or in deployment**

Country results higher than the entire target

# The biggest industries surveyed act on even more fronts simultaneously, implementing more measures concerning the decarbonisation of processes, the electrification of vehicles and a product design focused on the challenges of the transition.

Q10: And more specifically, at what level(s) has your company implemented these measures?

*Basis: Decision-makers that have already implemented decarbonisation measures (530)*

| | Totality | |
|---|---|---|
| Reduction of industrial waste, and solutions for collecting, recycling and reusing materials | 52% | |
| Optimisation of energy management | 43% | |
| Decarbonisation of processes: production chain, equipment, recycling and reuse of materials | 38% | 500 to 4,999 employees: 60% |
| Optimisation of the logistics chain | 34% | |
| Use of digital tools for smart management of buildings and processes | 33% | |
| Insulation and thermal renovation of buildings | 32% | |
| Electrification of the vehicle fleet | 31% | 500 to 4,999 employees: 45% |
| Product design: eco-design, use of biobased materials, lifecycle of materials | 26% | 500 to 4,999 employees: 46% |
| *Other actions implemented* | | |
| Optimisation of water management | 43% | Metallurgy: 70% |
| Cooperation with your suppliers and providers | 25% | |
| Average number of quotes | **3.6** | 500 to 4,999 employees: 4.5 |

**Companies that are already fully operational or in deployment**

Decarbonisation is almost systematically part of a *wider transformation of the sector as a whole*, *with Germany* and the agrifood sector being the exceptions here. The range of different partners involved is diverse, with the most in-demand being energy transition consultants, providers of multi-technical services or suppliers of low-carbon energy and local authorities / public bodies.

Q12: Is the decarbonisation of your company part of a wider transformation of your industrial sector?

Q13: Which partner(s) is your company collaborating with for this decarbonisation?

*Basis: Decision-makers that have already implemented decarbonisation measures (530) including through the overall decarbonisation of their sector (462)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| Basis: | | 175 | 118 | 76 | 94 | 67 |
| Yes, the decarbonisation is part of a wider transformation of their industrial sector | **78%** (Construction, building trade: 92%; Agrifood: 47%) | **91%** | **93%** | **91%** | **66%** | **87%** |
| | | 157 | 111 | 73 | 69 | 52 |
| Energy transition consultants | 46% | 35% | 49% | 54% | 48% | 38% |
| Local authorities and public bodies | 39% | 43% | 26% | 34% | 45% | 40% |
| Providers of multi-technical services | 38% | 35% | 49% | 37% | 33% | 30% |
| Suppliers of low-carbon energy | 38% (ISE: 53%) | 40% | 50% | 54% | 29% | 22% |
| Circular economy protagonists | 30% | 32% | 24% | 46% | 31% | 33% |
| Public research | 23% | 12% | 24% | 15% | 28% | 12% |
| NGOs | 17% | 11% | 21% | 6% | 17% | 18% |
| Other private companies through a partnership | 32% | 24% | 28% | 32% | 40% | 25% |
| Other partners | <1% | <1% | - | - | - | - |
| Average number of quotes | 2.6 | 2.3 | 2.7 | 2.8 | 2.7 | 2.2 |

Country results higher than the entire target

Results from sub-targets higher than the entire target

Results from sub-target lower than the entire target

Companies that are already fully operational or in deployment

# The evolution of discussions around decarbonisation is slowing down the transition of more than half of the companies in Europe, with *a more pronounced effect being felt in the United Kingdom and in the high-tech sector*. Although affected, the largest structures surveyed seem to be more resilient.

Q15: To finish, politicians and some industry leaders are now emphasizing the need to slow the pace of decarbonisation of industries. Do you think this shift in discourse is slowing your company's transition?

*Basis: all decision-makers (1336)*

| | Totality | France | United Kingdom | Belgium | Germany | Netherlands |
|---|---|---|---|---|---|---|
| *Basis:* | | *509* | *218* | *201* | *208* | *200* |
| **Total Yes, this is slowing down the company's transition** | **59%** | **52%** | **65%** | **58%** | **59%** | **66%** |
| Yes, very much so | **19%** (High tech: 32%) | 13% | 32% | 20% | 16% | 24% |
| Yes, somewhat | **40%** | 39% | 33% | 38% | 43% | 42% |
| **Total No, this is not slowing down the company's transition** | **36%** (500 to 4,999 employees: 46%) | 44% | 33% | 37% | 34% | 34% |
| No, not really | **25%** | 32% | 24% | 25% | 22% | 26% |
| No, not at all | **11%** | 12% | 9% | 12% | 12% | 8% |
| Don't know / Not aware of this issue | **5%** | 4% | 2% | 5% | 7% | <1% |

Country results higher than the entire target

Country results lower than the entire target

Results from sub-targets higher than the entire target

opinionway FOR EQUANS

# opinionway

PARIS • BORDEAUX • BRUSSELS • WARSAW • CASABLANCA • ABIDJAN

**Founded in 2000 on what was then a radically innovative idea, OpinionWay was a pioneer in transforming the practices of the marketing and opinion research profession.**

Building on continuous growth since its inception, the company has consistently expanded its horizons to better address all marketing and societal challenges. It has incorporated into its methodologies Social Media Intelligence, the use of smart data, creative co-creation dynamics, community-driven approaches, and storytelling. Today, OpinionWay continues its growth momentum by geographically expanding into high-potential regions such as Eastern Europe and Africa.

**Enable *today*, shape tomorrow**

**This mission drives the employees of OpinionWay and underpins the relationships they build with their clients.**

The pleasure they take in providing answers to the questions their clients ask, reducing uncertainty in decision-making, tracking relevant insights, and co-creating future solutions fuels every project they undertake. This enthusiasm, combined with a genuine passion for innovation and knowledge-sharing, explains why clients report high levels of satisfaction after each collaboration – 8.9/10 – and a strong recommendation rate – 3.88/4.Enjoyment, commitment, and intellectual stimulation are the three guiding principles of our work.

ESOMAR 25 Corporate

afaq ISO 20252 Étude marketing et d'opinion AFNOR CERTIFICATION

# Let's stay *connected*!

Receive our latest research results in your inbox every week by subscribing to our newsletter!

Subscribe

## Your contacts at OpinionWay

**Nadia Patel**
Market Business Transformation Assistant Manager
Tel. +33 1 81 81 83 15
npatel@opinion-way.com

**Alexandra Steffen**
Market Research Director
Tel. +33 1 81 81 83 25
asteffen@opinion-way.com