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FLASH EUROBAROMETER 549

SMEs, resource efficiency and green markets

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TELEPHONE EUROBAROMETER

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This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

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Introduction

The EU's 25.8 million small and medium enterprises (SMEs)[1] are the backbone of the EU economy. Employing 88.7 million people, they contributed significantly to the EU employment and value added.[2]

As well as being economically important, SMEs are environmentally important: although their individual impact is small, their cumulative impact on the environment is significant. With 67 tons, the average SME emits very little CO_2, especially if compared to emissions of 20 027 tons for the average large company (with 250 or more employees). Due to the large number of SMEs, however, their collective share in total emissions is high, at 63% of all CO_2 emissions by companies.[3]

Climate change and environmental degradation are an existential threat to Europe and the world. To overcome these challenges, the **European Green Deal** will transform the EU into a modern, resource-efficient and competitive economy.

The **European SME Strategy**[4] was announced on 10 March 2020 and aims to contribute to the objectives of the European Green Deal and other EU actions launched in the context of the twin digital and green transition, namely **achieving a climate-neutral, resource-efficient, and agile digital economy**, by **mobilising European SMEs across industrial sectors**.

In the context of the European SME Strategy, the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs commissioned a **Flash Eurobarometer survey** to evaluate the current levels of resource efficiency actions and the state of the green market among Europe's SMEs, as well as in neighbouring countries and in the US. This survey builds on the work of previous Flash Eurobarometer surveys (FL342 in 2012, FL381 in 2013, FL426 in 2015, FL456 in 2017 and FL498 in 2021).[5] Specifically, the survey covers the following topics:

- **Actions that SMEs are currently undertaking** to be more resource efficient, as well as **additional actions** that SMEs plan to implement over the next two years
- SMEs' use of **renewable energy**
- SMEs' **level of investment** in resource efficiency
- Measures in place to **reduce carbon footprint** and become climate neutral or negative
- **Barriers** to going green and resource efficient, such as complex administrative procedures or an **increase in production costs**

[1] The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises that employ fewer than 250 persons and that have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million. (Extract of Article 2 of the annex to Recommendation 2003/361/EC)

[2] Source: European Commission: Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, Joint Research Centre, Katsinis, A., Lagüera-González, J., Di Bella, L. et al., *Annual report on European SMEs 2023/2024 – SME performance review 2023/2024*, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2826/355464

[3] Source: European Commission: Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, Gorgels, S., Priem, M., Blagoeva, T., Martinelle, A. et al., *Annual report on European SMEs 2021/2022 – SMEs and environmental sustainability – Background document*, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2826/164089

[4] Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. **An SME Strategy for a sustainable and digital Europe.** COM/2020/103 final (https://ec.europa.eu/info/sites/default/files/communication-sme-strategy-march-2020_en.pdf)

[5] For more information: https://europa.eu/eurobarometer/surveys/browse/all/series/17833

- Type of **support for going green and resource efficient** – from in-house resources and expertise to **various types of external support**
- **Tools and forms of assistance that would help most** to go **green and resource efficient** – from grants or subsidies to demonstrations of technology
- **Green markets for SMEs**: SMEs offering green products or services and turnover attributed to these products and services
- SMEs' **use of recycled materials** in their products
- SMEs with an **explicit policy to extend the life span of their products**
- Type of **support for producing green products or services**
- **Forms of assistance that would help the most** to launch or expand the production and sale of **green products or services**
- **SMEs with employees in green jobs** (i.e. employees directly dealing with information, technologies or materials that preserves or restores environmental quality)

Flash Eurobarometer 549 'SMEs, green markets and resource efficiency' was conducted by Ipsos European Public Affairs in the 27 Member States of the European Union (EU), Iceland, Norway, Switzerland, the United Kingdom, Montenegro, Moldova, North Macedonia, Albania, Serbia, Türkiye and the United States. Between 3 and 28 June 2024, 18 160 enterprises (both SMEs and large companies, in the EU and non-EU countries) were interviewed via telephone. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Media monitoring and analysis" Unit).

The main analysis presented in this report focuses on SMEs in the EU (13 124 interviews). SMEs are subdivided into micro companies (<10 employees), small companies (10 to 49 employees) and medium-sized companies (50 to 249 employees). Across the EU, 94% of SMEs are micro companies. The strong presence of micro companies is observed across all EU Member States. As such, the average results presented in this report – where each type of SME is represented based on their share in the total population of SMEs – are driven by the survey observations made in micro companies. In addition to average results, the survey findings are presented by size of the SME, so that differences in uptake of resource efficiency actions, barriers to going green etc. across SMEs of different sizes become visible. Moreover, the survey findings for SMEs are compared to those for large companies, with 250 or more employees, surveyed in the EU (589 interviews with companies with 250-499 employees and 328 interviews with companies with 500+ employees) and to those for SMEs in a selection of non-EU countries (3 783 interviews).

Notes

- **Survey data are weighted** to known population proportions. The EU27 averages are weighted according to the size of the SME population of each EU Member State.
- Survey results are subject to sampling tolerances meaning that not all apparent differences between countries or groups, or across time may be **statistically significant**. Thus, only differences that are statistically significant (at the 5% confidence level) – i.e. where it can be reasonably certain that they are unlikely to have occurred by chance – are highlighted in the text.
- The report looks at the most recent **year-on-year changes** at EU and national level. The term **percentage point** is used when comparing two different percentages (the abbreviation is pp). Year-on-year differences are calculated from percentages with one decimal and are then rounded to the nearest integer.
- Percentages may not add up to 100%, as they are **rounded to the nearest percent**. Due to rounding, it may also happen that the percentages for separate response options shown in the charts do not exactly add up to the totals mentioned in the text. Response percentages exceed 100% if the question allowed respondents to select multiple responses.
- For some of the small Member States (Cyprus, Malta and Luxembourg) and some of the non-EU countries surveyed (Albania, Montenegro and Moldova), the **sample size is relatively low,** and results should be interpreted with caution as they carry a larger margin of error.
- In this report, countries are referred to by their official abbreviation. The abbreviations used in this report are indicated below.

BE	Belgium	FR	France	NL	Netherlands
BG	Bulgaria	HR	Croatia	AT	Austria
CZ	Czechia	IT	Italy	PL	Poland
DK	Denmark	CY	Rep. of Cyprus*	PT	Portugal
DE	Germany	LV	Latvia	RO	Romania
EE	Estonia	LT	Lithuania	SI	Slovenia
IE	Ireland	LU	Luxembourg	SK	Slovakia
EL	Greece	HU	Hungary	FI	Finland
ES	Spain	MT	Malta	SE	Sweden
UK	United Kingdom	ME	Iceland	RS	Serbia
IS	Iceland	MD	Moldova	TR	Türkiye
NO	Norway	MK	North Macedonia	US	United States
CH	Switzerland	AL	Albania		

* Cyprus as a whole is one of the 27 EU Member States. For practical reasons, interviews are only carried out in the part of the country controlled by the government of the Republic of Cyprus.

Main findings

Going green and resource efficient

- The **most common resource efficiency actions undertaken by EU SMEs** are **minimising waste** and **saving energy** (both mentioned by 66%). These are followed by **saving materials** (mentioned by 57%), **saving water** (49%) and **recycling by reusing material or waste within their company** (48%).
- **Most SMEs surveyed are undertaking a range of resource efficiency measures**. More specifically, 42% of EU SMEs report that they are undertaking five or more of the resource efficiency actions listed in the survey, 31% are undertaking three or four actions and 20% one or two actions; the remaining 6% of EU SMEs are not taking any action.
- **Compared to 2021**, SMEs are now more likely to save energy (66%, +5 pp), save water (49%, +3 pp), design products that are easier to maintain, repair or reuse (29%, +3 pp) and use predominantly renewable energy sources (e.g. including own production trough solar panels, etc.) (24%, +5 pp). In the period **from 2015 to 2024**, the proportion of EU SMEs using predominantly renewable energy has more than doubled (from 11% to 24%).
- About eight in ten (81%) SMEs surveyed **plan to implement at least one (additional) resource efficiency action in the next two years** (+4 pp compared to 2021).
- A majority of SMEs (58%) plan to implement (further) **energy savings** in the next two years and 34% are looking to switch to use **predominantly renewable energy sources** (including e.g. own production trough solar panels). Over one in two SMEs (53%) will implement (further) measures to **reduce waste**, 47% will do so to **save materials** and 45% to **save water**.

Using renewable energy

- Somewhat more than one in ten SMEs (12%) **generate renewable energy onsite (e.g. solar panels, wind power)** and 23% report to purchase energy from a renewable energy supplier (but do not generate renewable energy onsite).
- 32% of SMEs generating renewable energy onsite report that the on-site energy production accounts for **at least 50% of their energy consumption**.

Investment in resource efficiency

- A vast majority of SMEs across the EU are taking resource efficiency measures, but actual investment in resource efficiency remains low – 38% of SMEs surveyed **invested 1% or more of their turnover in this area in the past two years** (+3 pp compared to 2021).
- 13% of SMEs have invested, on average, **more than 5%** of their annual turnover over the past two years to become more resource efficient and 25% say that the investment amounted to **between 1% and 5%**, on average, of their annual turnover.

Carbon reduction strategy

- 21% of SMEs have **a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative and 4% report that they are already climate neutral. Another 19% of SMEs reply that they do not have a carbon reduction strategy in place but are **planning to define one**.

Difficulties setting up resource efficiency actions

- 35% of SMEs undertaking resource efficiency actions say they **encountered complex administrative or legal procedures setting up these actions** and 26% refer to **complex environmental reporting**

requirements. The cost of environment actions is mentioned by 28% of SMEs as a barrier encountered trying to set up resource efficiency actions.

- 26% of SMEs undertaking resource efficiency actions reply that they **did not encounter any difficulties** when setting up these actions.

Impact of resource efficiency actions on production costs

- Among SMEs taking resource efficiency actions, 4% say these actions have **significantly decreased their production costs over the past two years** and 26% that there was **a slight decrease** in production costs. One in five SMEs (20%) say production costs have **slightly increased** and 16% that this increase has been **significant**. About a quarter (24%) say there has been no change in production costs as a result of the resource efficiency actions.

Support to go green and resource efficient

- Among SMEs that have taken resource efficiency actions, 61% rely on their **own financial resources** and 50% on their **own technical expertise** in their efforts to be more resource efficient. Comparatively less SMEs (23%) rely on **external support**.

What would help SMEs most to go green and resource efficient?

- 37% of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient; as in 2021, this is the most-mentioned form of assistance.

- The **other forms of assistance** are selected by between 15% and 25% of respondents. For example, 22% of SMEs think that **advice on funding possibilities and financial planning for resource efficiency investments** would help their company the most to be more resource efficient (+3 pp compared to 2021).

SMEs offering green products or services

- 32% of SMEs **offer green products or services**, with a further 12% **planning to do so in the next two years**. A slim majority of SMEs (52%) do not offer green products or services and have no plans to do so.

- 24% of SMEs selling green products and services reply that these products and services **represent more than 50% of their turnover of the latest fiscal year**. For 44% of SMEs selling green products and services, however, these products and services make up not more than 10% of their most recent annual turnover.

Use of recycled materials

- Among SMEs selling products, **56% report that they use recycled materials in their products**. For about a quarter of these SMEs, the share of recycled materials in their products/production is at least 20%.

Life span of products

- About half of SMEs selling products answer that their company has **an explicit policy to extend the life span of their products** (e.g. choosing durable materials, dedicated repair services for customers etc.): 22% say they have such a policy for all their products and 25% for some of their products.

Support for the production of green products and services

- Among SMEs offering green products and services, 60% rely on their **own financial resources** and 57% on **their own technical expertise** for the production of these products and services. About a quarter (25%) of these SMEs rely on **external support.**

What would help SMEs the most to expand green offer?

- 42% of SMEs selling green products or services say that **financial incentives for developing products, services or new**

production processes would help them the most to expand their green offer.

- Financial incentives are much more likely to be mentioned than **other form of assistance**, such as support with identifying potential markets or customers (29%).

What would help SMEs the most to launch a green offer?

- Among SMEs not currently offering green products or services, **financial incentives for developing new products, services or production processes** (34%) are also the most-mentioned type of support that would help to launch a green offer.
- While 13% of SMEs currently offering green products or services reply that none of the types of support would help them to expand their offer, among SMEs not offering green products or services, nearly three times as many (36%) reply that **none of the support measures would help them to launch a range of green products or services**.

Green jobs

- A 'green job' is one that directly deals with information, technologies, or materials that preserve or restore environmental quality. **Just under four in ten SMEs have at least one full-time employee working in a green job some or all the time**: 34% say there are between one and five 'green' employees in their SME and 3% report that their number is higher than five.

1. Going green and resource efficient

The first chapter looks at the **actions that SMEs are currently undertaking** to be more resource efficient, as well as the **additional measures** SMEs plan to implement over the next two years. In this analysis, specific attention is being paid to **renewable energy measures** (such as the generation of renewable energy). This is followed by an analysis of SMEs' **level of investment** in resource efficiency and a discussion whether SMEs have concrete **carbon reduction strategies** in place.

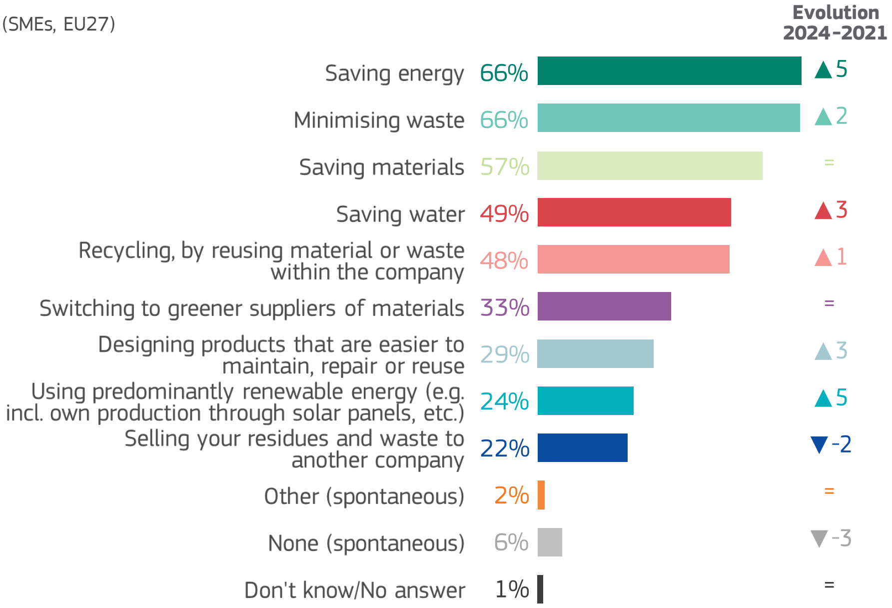
For the purpose of this survey, resource efficiency was defined as **using natural resources in a sustainable and environmentally friendly manner, and this at different stages, from supply and production to, for example, waste management**.

1.1. Resource efficiency actions taken by SMEs

Companies participating in this survey were presented with a list of nine actions that can be taken to be more resource efficient. Most SMEs surveyed are taking measures to be more resource efficient: **93% of EU SMEs are taking at least one of the actions listed in the survey (+3 pp compared to 2021, Flash Eurobarometer 498)**,[6] while 6% are not taking any action. A handful of respondents (1%) report that they 'do not know' if actions are being taken in their SME.

Most SMEs are also undertaking a range of resource efficiency measures. More specifically, 42% of EU SMEs report that they are undertaking five or more of the resource efficiency actions listed in the survey, 31% are undertaking three or four actions and 20% one or two actions. As already mentioned, the remaining 6% of EU SMEs are not taking any action.

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

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[6] Source:
https://europa.eu/eurobarometer/surveys/detail/2287

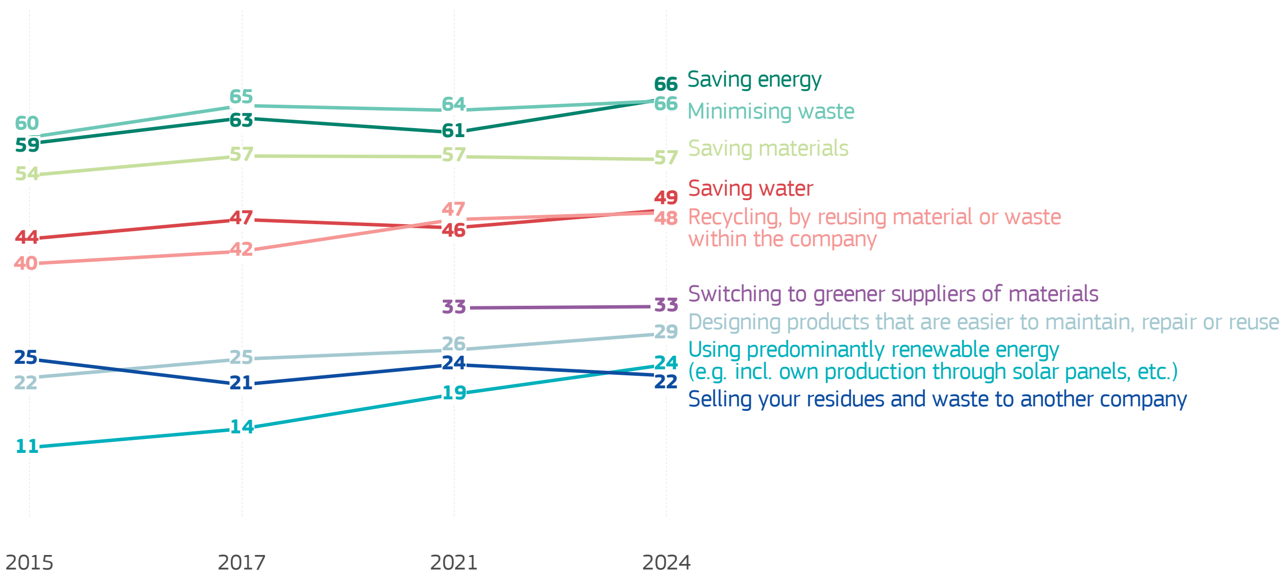
The chart on the previous page shows that the **most common resource efficiency actions undertaken by EU SMEs** are **minimising waste** and **saving energy** (both mentioned by 66%). These are followed by **saving materials** (mentioned by 57%), **saving water** (49%) and **recycling by reusing material or waste within their company** (48%).

Compared to 2021, SMEs are now more likely to save energy (66%, +5 pp), save water (49%, +3 pp), design products that are easier to maintain, repair or reuse (29%, +3 pp) and use predominantly renewable energy sources (e.g. including own production trough solar panels, etc.) (24%, +5 pp).[7]

EU SMEs' uptake of various resource efficiency measures has been measured across time.[8] The trend chart below shows that, for many actions listed in the survey, an increasing trend in uptake can be observed **from 2015 to 2024**. For example, the proportion of EU SMEs reporting that they are using predominantly renewable energy has more than doubled in the period from 2015 to 2024 (from 11% to 24%).

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2015-2024

[7] Survey results are subject to sampling tolerances. Only differences that are statistically significant (at the 5% confidence level) are highlighted in the text.

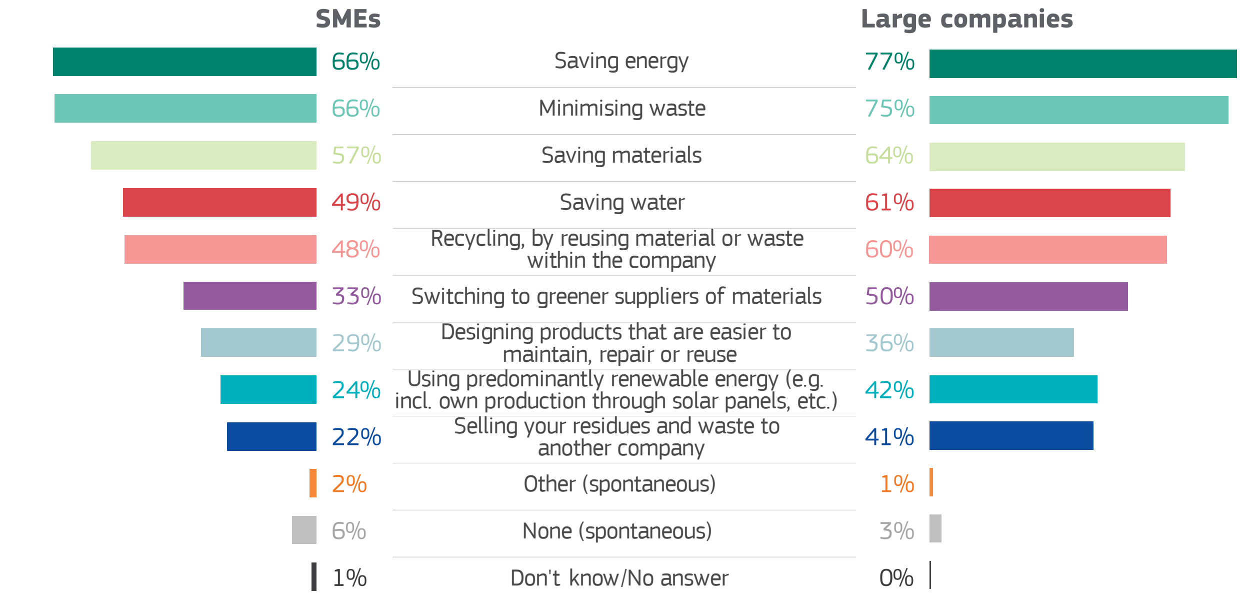
[8] For more information: https://europa.eu/eurobarometer/surveys/browse/all/series/17833

SMEs vs large companies

As part of this survey, in addition to the 13 124 interviews across the EU with SMEs, 917 interviews were conducted with large companies (with 250 or more employees) across the EU. Comparing SMEs to large companies shows that **large companies are more likely to report that they are undertaking the resource efficiency actions listed in the survey**. For example, while 66% of SMEs report saving energy, this figure increases to 77% for large companies. The biggest differences between SMEs and large companies are found for selling of residues and waste to another company (22% for SMEs vs 41% for large companies) and using of predominantly renewable energy (24% vs 42%, respectively).

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by ecosystem

Across all industrial ecosystems,[9] **a large majority of EU SMEs are taking measures** to be more resource efficient and **few are not taking any action**. The proportion of SMEs **not taking action** ranges from 2% in 'Electronics' and 'Energy - renewables' to 10% in 'Energy intensive industries' and 'Health'.

Across most industrial ecosystems, the **most common resource efficiency actions undertaken** are saving energy, minimising waste and saving materials. There are, however, also some important **differences across the industrial ecosystems in terms of uptake of certain measures**. For example, 60% of SMEs in 'Electronics' and 63% in 'Energy – renewables' reply that they are recycling, by reusing material or waste within the company; this figure is 31% in the industrial ecosystem of 'Health'. Similarly, while 49% of SMEs in 'Textile' answer that they are switching to greener suppliers of materials, this proportion is 21% in the industrial ecosystem of 'Energy intensive industries'.

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]
(Ecosystems, SMEs, EU27)

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. incl. own production through solar panels, etc.)	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	75	63	61	51	42	25	34	30	33	6	8	1
Agri-food	65	61	69	49	42	35	18	20	29	2	4	1
Construction	61	70	61	43	47	32	35	24	26	1	6	1
Cultural and creative industries	58	65	50	46	49	29	21	22	23	2	6	3
Digital	65	55	47	38	38	28	19	24	14	3	8	0
Electronics	79	49	54	40	60	43	39	17	20	2	2	6
Energy - renewables	76	64	55	58	63	35	50	57	31	1	2	2
Energy intensive industries	57	69	55	44	50	21	37	29	24	0	10	0
Health	61	61	50	47	31	35	45	27	15	0	10	1
Mobility - Transport - Automotive	69	64	58	54	47	31	30	20	28	3	7	1
Proximity, social economy and civil security	73	70	57	61	47	40	30	26	23	1	5	1
Retail	66	63	55	47	51	36	29	23	23	1	6	1
Textile	66	72	62	55	55	49	33	30	27	0	3	0
Tourism	72	73	61	61	53	42	33	28	25	1	3	4

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each ecosystem is shown in dark green and white font.
(%, EU27) Base: n=13 124 (SMEs)

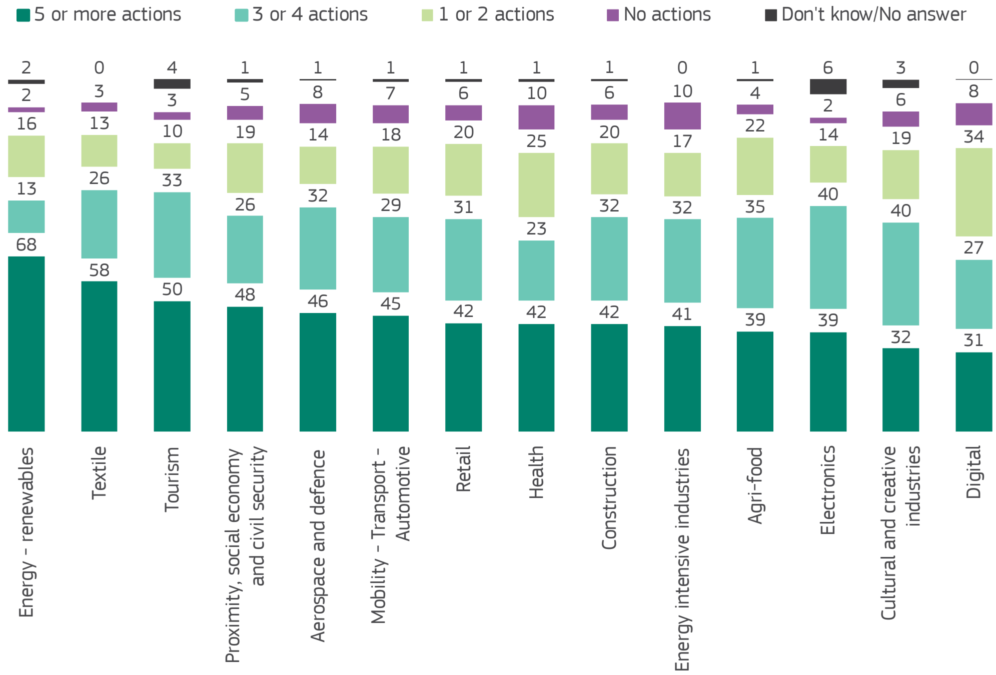
[9] For more information about industrial ecosystems and their definition, see the Technical specification at the end of the report.

SMEs in 'Energy - renewables' (68%) are the most likely to report **undertaking five or more of the resource efficiency actions** listed in the survey. In sharp contrast, in 'Digital' (31%) and 'Cultural and Creative Industries' (32%), less than half as many SMEs are undertaking at least five actions.

The share of SMEs undertaking just **one or two actions** is highest in 'Digital', followed by 'Health' (25%) and Agri-food' (22%). As noted above, 10% of SMEs in 'Energy intensive industries' and 'Health' report taking **no actions at all** to be more resource efficient.

Q1 What actions is your company undertaking to be more resource efficient?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Business demographics

It was noted above that, compared to SMEs, large companies (250+ employees) are more likely to report that they are undertaking the resource efficiency actions listed in the survey. It is important to note here that, in this comparison, the results for SMEs are mainly driven by those for micro companies (with less than ten employees) – this is because the vast majority of SMEs are micro companies. The analysis presented in the table on the next page shows that the difference between **large companies** (250-499 employees or 500+ employees) and **medium-sized SMEs** (with between 50 and 249 employees) is smaller for many of the resource efficiency actions considered in the survey.

The larger the SME in terms of **employees**, the more likely it is to be implementing most of the resource efficiency measures included in the survey. For example, while 66% of micro companies have taken actions to save energy, this proportion increases to 74% for medium-sized companies. Similarly, 24% of micro companies use predominantly renewable energy, in contrast with 41% of medium-sized companies.

Comparing smaller and larger SMEs in terms of **turnover in 2023**, a similar trend is seen for using predominantly renewable energy (e.g. including own production through solar panels, etc.) (from 18% for SMEs with up to €100 000 turnover in 2023 to 38% for SMEs with more than €10 000 000 in turnover) and selling residues and waste to another company (from 15% for SMEs with up to €100 000 turnover in 2023 to 27% for SMEs with more than €2 000 000 or more than €10 000 000 in turnover). Focusing on the proportion of SMEs that are not taking any action to be more resource efficient, this proportion is 9% for SMEs with up to €100 000 turnover in 2023 and decreases to 3% for SMEs with more than €10 000 000 in turnover).

SMEs are also categorised in terms of recent growth, paying specific attention to **high-growth SMEs (including gazelles)**. For many of the resource efficiency actions covered in the survey, there is no statistically significant difference in uptake by company growth. However, it can be noted, for example, that gazelles (i.e. young high-growth companies) are more likely than their counterparts to report designing products that are easier to maintain, repair or reuse (39% vs 28%-31%).

The results by **NACE sector** show that uptake of the various measures to be more resource efficient tends to be lowest in the services sector. For example, 35% of SMEs in manufacturing, compared to 17% in services are selling their residues and waste to another company; the corresponding figure for SMEs in industry is 28% and it is 26% for those in retail.

In line with the differences observed by NACE sector, SMEs that are only **selling services** are slightly more likely than those **selling products** (or both products and services) not to be taking action to be more resource efficient (8% vs 4%-5%). The proportion having taken a specific action is highest for SMEs that sell both products and services for many of the measures listed in the survey.

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]
(SMEs, EU27)

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	66	66	57	49	48	33	29	24	22	2	6	1
Company size												
Micro (<10 empl.)	66	65	56	49	48	33	29	24	22	2	6	1
Small (10-49 empl.)	69	71	60	50	51	38	31	32	33	2	4	1
Medium-sized (50-249 empl.)	74	70	61	53	51	42	31	41	39	1	3	1
Large (250-499 empl.)	72	71	62	59	60	46	33	41	39	1	2	0
Large (500+ empl.)	86	81	67	64	60	56	41	43	44	0	4	0
Company turnover (2023)												
Up to €100 000	66	60	55	50	45	30	26	18	15	2	9	0
€100 001-€500 000	66	68	59	50	49	36	30	23	21	2	6	0
€500 001-€2 000 000	70	68	57	48	49	35	33	25	32	2	4	3
€2 000 001-€10 000 000	66	73	57	46	50	36	31	37	27	1	5	1
More than €10 000 000	63	65	55	48	44	26	20	38	27	3	3	1
Company growth[1]												
Gazelles	62	62	53	50	47	43	39	17	21	3	9	1
High-growth companies	71	65	57	48	50	36	28	28	26	2	6	1
Weak/no-growth companies	65	67	57	49	48	31	29	24	22	2	6	1
Negative-growth companies	68	60	57	47	46	41	31	24	20	2	6	1
Sector of activity (NACE)[2]												
Manufacturing (C)	66	72	64	53	51	36	35	25	35	2	3	2
Industry (B/D/E/F)	62	71	61	46	51	32	37	27	28	1	6	1
Retail (G)	69	67	57	52	52	37	30	24	26	1	5	1
Services (H/I/J/K/L/M)	66	62	53	47	44	32	25	23	17	2	8	2
Selling products/services												
Products	67	64	52	50	54	32	25	22	25	1	4	1
Services	66	63	57	47	42	30	25	23	17	2	8	2
Both	66	71	60	50	53	39	39	28	29	1	5	1

Notes: (1) High-growth is defined as growth of 10% or more annually over the past three years in terms of employees and/or turnover (growth in terms of employees is only considered from companies with 10 or more employees); categories: Gazelles (max 5.5 year-old, high-growth companies); High-growth companies (excl. gazelles); Weak/no-growth companies (incl. <1.5 year-old companies); and Negative-growth companies (companies having decreased both in number of employees and turnover).
(2) Four large NACE sector groupings: Manufacturing (companies engaged in the transformation of materials, substances or components into new products); Industry (companies in (1) mining and quarrying, (2) electricity, gas, steam and air conditioning supply, (3) water supply; sewerage, waste and remediation, and (4) construction); Retail (companies in the wholesale and retail trade (incl. repair of motor vehicles and motorcycles)); Services (the service sector produces services (instead of goods), such as maintenance and repairs, training and consulting etc.). For more information about NACE (Statistical classification of economic activities in the European Community), see: https://ec.europa.eu/eurostat/web/nacerev2/overview
(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by EU Member State

About three-quarters – or more – of respondents in Denmark (76%), France (76%), Belgium (77%), Slovakia (82%) and Spain (84%) report that they are **saving energy** to be more resource efficient. In another 18 Member States, at least a slim majority of SMEs report the same. SMEs in the Netherlands (41%) and Sweden (42%) are the most likely in the EU to use **predominantly renewable energy**. In Denmark, Austria, Germany and Belgium, between 34% and 38% of SMEs use predominantly renewable energy. In most other Member States, however, the proportion of SMEs using predominantly renewable energy remains below a quarter.

More than eight in ten SMEs in Belgium (83%) Slovakia (82%) and Spain (82%) report that they are **minimising waste**. In another 15 Member States, more than half of respondents say the same. The proportion of SMEs that are **selling their residues and waste** to another company ranges from 8% in Cyprus and Ireland to 31% in Luxembourg and the Netherlands.

Respondents in Lithuania (78%) and Spain (79%) are overall the most likely to say that their SME is **saving materials**; in Sweden (76%) and Slovakia (74%), about three-quarters of respondents say the same. In another 12 Member States, at least half of SMEs are saving materials.

A majority of SMEs in Spain are **switching to greener suppliers of materials** (53%); in the other Member States, this proportion varies between 14% in Portugal and 44% in Belgium. The proportion of SMEs that are **recycling by reusing material and waste within their company** remains below 50% in 17 Member States; in the other Member States, this figure ranges from 50% in Finland and Cyprus to 77% in Spain.

More than seven in ten SMEs in Spain (73%) and Slovakia (78%) report that they are **saving water**; this proportion is close to two-thirds in France (65%) and Lithuania (64%). In most other Member States, less than half of SMEs report saving water to be more resource efficient.

Finally, the proportion of SMEs that are **designing products that are easier to maintain, repair or reuse** varies between 10% in Portugal and 45% in Spain.

The proportion of SMEs that report **not taking any action to be more resource efficient** remains low in most Member States (e.g. 1% in Italy and 2% in Austria, the Netherlands and Spain). In nine Member States, there are at least 10% of SMEs that are not (yet) taking action; with the overall highest proportion observed in Latvia (25%), followed by Slovenia (18%), Hungary (17%), Estonia (17%) and Romania (16%).

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]
(SMEs, EU27)

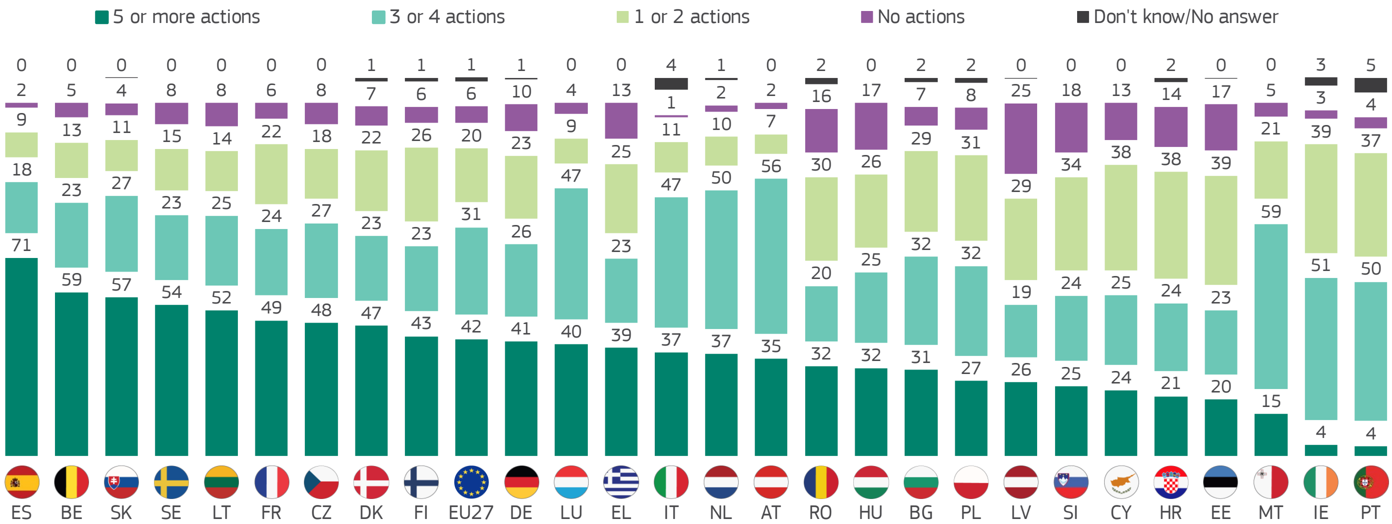
	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. incl. own production through solar panels, etc.)	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	66	66	57	49	48	33	29	24	22	2	6	1
BE	77	83	65	55	48	44	34	38	28	1	5	0
BG	61	60	50	50	27	29	21	10	20	3	7	2
CZ	65	75	61	51	47	35	39	17	28	0	8	0
DK	76	63	56	49	42	35	30	34	22	5	7	1
DE	66	59	52	35	39	33	32	37	22	2	10	1
EE	52	46	39	33	36	19	17	9	12	0	17	0
IE	40	49	24	29	55	26	16	13	8	1	3	3
EL	67	52	56	48	33	34	23	16	15	0	13	0
ES	84	82	79	73	77	53	45	26	28	0	2	0
FR	76	70	51	65	51	39	34	11	24	2	6	0
HR	52	50	41	34	32	16	16	10	17	1	14	2
IT	58	79	56	38	48	28	28	32	22	2	1	4
CY	57	41	39	32	50	24	13	15	8	0	13	0
LV	52	41	47	39	15	20	14	9	17	5	25	0
LT	72	63	78	64	33	43	27	18	26	0	8	0
LU	57	66	49	44	53	37	31	30	31	4	4	0
HU	66	54	45	46	23	20	14	23	19	5	17	0
MT	36	45	39	49	45	42	24	18	25	2	5	0
NL	58	62	61	32	56	26	28	41	31	3	2	1
AT	63	74	55	44	47	35	28	35	21	0	2	0
PL	64	50	53	48	37	23	14	15	16	1	8	2
PT	42	20	30	35	55	14	10	17	20	7	4	5
RO	54	47	45	42	34	34	26	11	19	0	16	2
SI	43	51	38	28	37	25	24	19	15	5	18	0
SK	82	82	74	78	51	39	26	14	20	0	4	0
FI	65	63	63	38	50	29	36	30	18	0	6	1
SE	69	76	76	39	57	39	33	42	17	2	8	0

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each country is shown in dark green and white font.
(%, EU27) Base: n=13 124 (SMEs)

It was noted earlier that 42% of EU SMEs are **undertaking five or more of the resource efficiency actions** listed in the survey. At the individual country level, this share ranges from just 4% in Ireland and Portugal to 71% in Spain. Spain is joined at the higher end of the country ranking by Lithuania (52% 'five or more actions'), Sweden (54%), Slovakia (57%) and Belgium (59%). In Ireland and Portugal, on the other hand, about half of SMEs (50%-51%) report to be undertaking **three or four resource efficiency measures** and close to four in ten SMEs (37%-39%) are undertaking **one or two actions**. The share of SMEs undertaking just one or two actions is also high in Cyprus (38%), Croatia (38%) and Estonia (39%). The share of SMEs not undertaking any actions, however, is overall the highest in Latvia (25%).

Q1 What actions is your company undertaking to be more resource efficient?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Non-EU countries

The largest share of SMEs in **Iceland, Montenegro, Norway, Türkiye, Switzerland, the UK and the US** report that they are minimising waste (between 48% in Montenegro and 78% in the US). The largest share of SMEs in **Moldova** (60%), **Serbia** (40%), **North Macedonia** (22%) and **Albania** (21%) are saving energy and the largest share of SMEs in **Türkiye** (59%) report that they are saving materials.

In five of the non-EU countries surveyed, less than 10% of SMEs are not taking any action to be more resource efficient. In **North Macedonia** and, even more so, in **Albania**, this proportion is much higher (35% and 53%, respectively).

Caution should, however, be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries (between 93 and 105 per country).

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]
(SMEs, non-EU countries)

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. incl. own production through solar panels, etc.)	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	66	66	57	49	48	33	29	24	22	2	6	1
UK	53	73	49	46	68	44	30	26	16	1	1	1
IS	35	55	41	18	34	31	23	20	18	2	11	4
NO	55	75	48	28	53	40	37	18	19	4	10	1
CH	69	71	53	40	54	46	30	37	25	2	4	3
ME	38	48	28	35	16	25	4	8	17	0	18	0
MD	60	19	33	39	16	12	6	8	7	3	18	4
MK	22	20	19	12	14	6	7	4	11	10	35	3
AL	21	9	19	16	16	4	6	7	6	0	53	0
RS	40	35	39	28	21	13	11	5	22	0	22	1
TR	54	57	59	53	43	42	36	11	23	0	15	1
US	68	78	67	61	68	48	46	14	25	0	6	0

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each country is shown in dark green and white font.
(%, non-EU countries) Base: n=3 783 (SMEs)

Trend compared to 2021

The table on the next page shows the **trend compared to 2021, at a country-by-country basis**. Green values indicate a positive trend – i.e. an increase in the proportion of SMEs undertaking the action (or a decrease in the proportion of SMEs not undertaking any actions – last column in the table). Red values indicate a negative trend – i.e. a decrease in the proportion of SMEs undertaking the action (or an increase in the proportion of SMEs not undertaking any actions).

As noted at the start of this chapter, 93% of EU SMEs report that they are undertaking one or more resource efficiency measures, compared to 6% that are not undertaking any action in this regard. **Compared to 2021**, there is a small, but significant, decrease in the proportion of SMEs across the EU that are not taking any action to be more resource efficient (from 9% to 6%, -3 pp).

A **decrease in the proportion of SMEs not taking any resource efficiency measures** is also seen about half of the individual Member States. The largest decreases in this proportion are observed in Bulgaria (-13 pp, to 7%), Poland (-11 pp, to 8%) and Denmark (-9 pp, to 7%).

An **opposite trend** is observed in Latvia and Hungary; in these two countries, a significant increase is seen in the proportion of SMEs that are not taking any measures to be more resource efficient (+15 pp in Latvia and +10 pp in Hungary).

The **evolution since 2021 looking at uptake of each of the individual resource efficiency measures** shows a more mixed picture. For all measures, there are both countries where the proportion undertaking the action has increased and countries where an opposite trend is seen. In line with the EU average results, however, for the actions of **saving energy** and **using predominantly renewable energy sources** and, the trend in a majority of the Member States shows an **increase in uptake**. For example, in 15 Member States, the proportion of SMEs that are using predominantly renewable energy sources has increased by five or more percentage points compared to 2021. The largest increase for this measure is observed in Denmark (+22 pp, to 34%), followed by Luxembourg (+13 pp, to 30%).

In some Member States, for all resource efficiency measures listed in the survey, **the proportion undertaking action has increased**. This is the case, for example, in Bulgaria and Denmark. In some other countries, on the contrary, **a decrease in uptake of most of the measures** listed in the survey is seen; this applies, for example, to Latvia and Hungary, but also Romania and Sweden.

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]
(SMEs, EU27)

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. incl. own production through solar panels, etc.)	Selling your residues and waste to another company	None (spontaneous)
EU27	▲5	▲2	=	▲3	▲1	=	▲3	▲5	▼-2	▼-3
BE	▲8	▲4	▲4	▲7	▲10	▲8	▲9	▲3	=	=
BG	▲24	▲30	▲23	▲29	▲8	▲21	▲15	▲6	▲6	▼-13
CZ	▲9	▲4	▲10	▲8	▲2	▲4	▲4	▲7	▲2	▼-5
DK	▲31	▲31	▲25	▲27	▲16	▲16	▲16	▲22	▲9	▼-9
DE	▼-3	▲2	▼-2	▼-7	▼-11	▼-1	▲6	▲6	▼-4	▼-5
EE	▲6	▲4	▼-7	▲3	▲9	▼-1	▼-1	▲2	▼-7	▼-6
IE	▲2	=	▲3	=	▲3	▼-2	▼-1	▲1	=	▼-6
EL	▲15	▲9	▲6	▲10	▼-14	▼-3	▲1	▲4	▼-7	=
ES	▲6	=	▼-6	▲3	=	▼-1	▲9	▲8	▼-6	▼-3
FR	▲35	▲21	▲11	▲27	▲9	▲14	▲10	▲4	▲3	▼-6
HR	▲1	▼-9	▼-6	▼-6	▼-1	▼-7	▼-8	▲5	▼-4	▲3
IT	▼-5	▼-5	▼-3	▼-7	▲5	▼-4	▲2	▲6	▼-1	▼-2
CY	=	▲7	▼-5	▼-5	▲7	▲2	▲3	▼-3	▼-2	▼-3
LV	▼-9	▼-4	▼-7	▼-1	▼-7	▼-7	▼-8	▲5	▼-6	▲15
LT	▲15	▲15	▲15	▲18	▲18	▲8	▲5	▲8	▼-1	=
LU	▼-1	▼-3	▼-5	=	▲1	▼-6	▼-3	▲13	▲5	▼-3
HU	▼-3	▼-4	▼-16	▼-4	▼-12	▼-9	▼-13	▲6	▼-6	▲10
MT	▼-1	▼-3	▼-7	=	▲4	▲4	▲1	▼-6	▼-2	▼-4
NL	▼-5	▼-8	▲2	▼-4	▲4	▼-9	▼-4	▼-4	▲7	▼-4
AT	▼-2	▲7	▼-4	▼-1	=	▲7	▲6	▲3	▼-8	▼-3
PL	▲7	▼-3	▼-2	▲3	▲5	▼-2	▼-3	▲6	▼-6	▼-11
PT	▼-5	▼-6	▼-4	▼-3	▲5	=	▼-2	▲8	▲5	▼-2
RO	▼-12	▼-22	▼-22	▼-18	▼-5	▼-4	▼-5	▲3	▼-7	▲3
SI	▼-8	▼-7	▼-4	▼-6	▲1	▼-9	▲7	▲7	▼-8	▲6
SK	▲5	=	▼-3	▲6	▼-2	▼-5	▼-8	▲6	▼-6	▲1
FI	▲6	▲2	▲5	▲7	▲9	▲1	▲6	▲4	▼-5	▼-3
SE	▼-6	▼-9	▼-4	▼-9	▼-11	▼-12	▼-10	▼-1	▼-6	▲3

Note: green cells indicate a positive trend (i.e. an increase in uptake for a specific measure or a decrease in the share of SMEs implementing 'none' of the measures); red cells represent a negative trend.
(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

1.2. Resource efficiency actions planned for the next two years

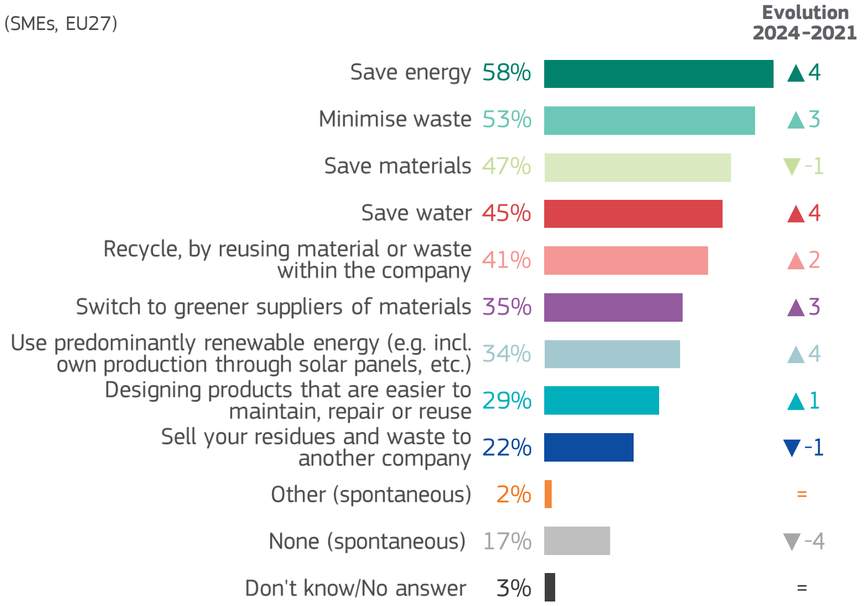
As noted in the previous section, a large majority of SMEs are already implementing a range of resource efficiency actions. Respondents in this survey were next asked which additional resource efficiency actions their SME is planning to implement over the next two years.

About eight in ten (81%) SMEs surveyed plan to implement at least one (additional) resource efficiency action in the next two years (+4 pp compared to 2021, Flash Eurobarometer 498), while 17% are not planning for any additional resource efficiency measures. A handful of respondents (3%) 'do not know' if additional actions are being planned in their SME.

A majority of SMEs (58%) plan to implement (further) **energy savings** in the next two years and 34% are looking to switch to use **predominantly renewable energy sources** (including e.g. own production trough solar panels). Over one in two SMEs (53%) will implement (further) measures to **reduce waste** and 22% of SMEs reply that they will **sell their residues and waste** to another company. Over four in ten SMEs (45%) plan to increase efforts to **save water**. Almost one in two SMEs (47%) are looking to implement (further) actions to **save materials** and just over a third (35%) want to **switch to greener suppliers of materials**. About four in ten SMEs (41%) are planning to **recycle, by reusing material or waste** within their company. Finally, 29% of SMEs plan to **design products that are easier to maintain, repair or reuse**.

Compared to 2021, and in line with the trend observed for resource efficiency actions already undertaken, there are now significantly more SMEs that say they will take (additional) measures in the next two years to **save energy** (+4 pp), **save water** (+4 pp), **use predominantly renewable energy sources** (+4 pp) or **switch to greener suppliers of materials** (+3 pp).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

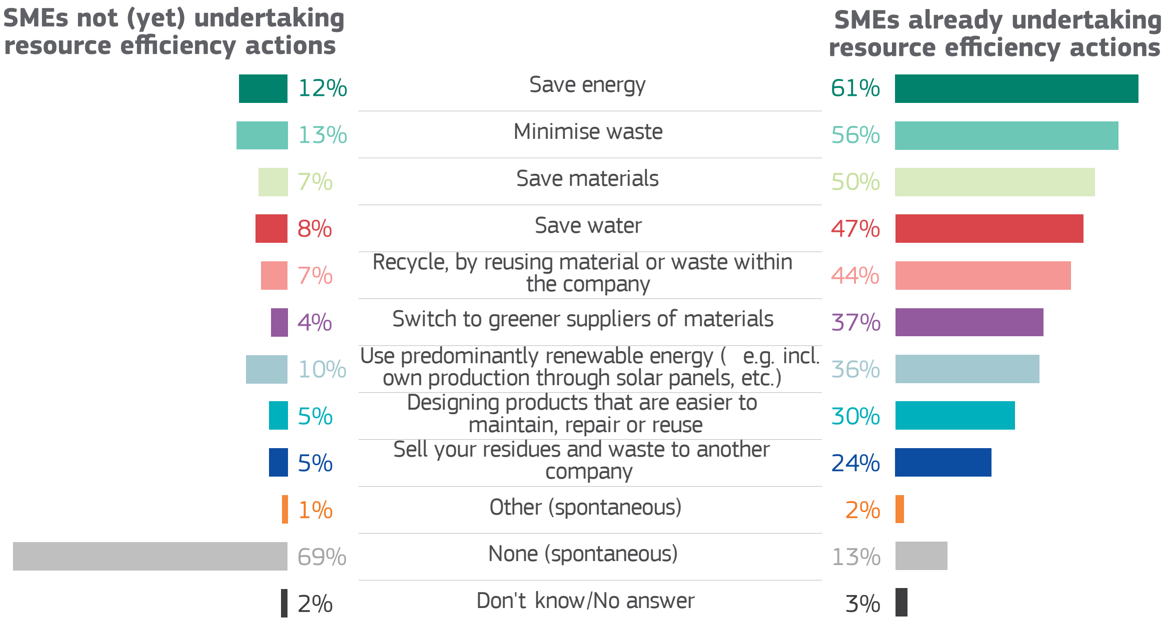
The following figure compares intentions to implement resource efficiency actions over the next two years for SMEs that are not yet undertaking such actions (6% of all SMEs – see previous section) and those already undertaking resource efficiency actions (93% of SMEs).

A large majority (85%) of SMEs that are **already undertaking resource efficiency actions** are planning to implement additional actions over the next two years – for example, 56% plan to minimise waste and 24% will look into selling their residues and waste to another company. Among these SMEs, 13% reply that they are not planning any additional resource efficiency actions in the next two years.

Among SMEs **not yet taking resource efficiency actions**, however, about seven in ten (69%) say that they also do not plan to implement any such actions in the next two years, while 30% are planning to start with the implementation of resource efficiency actions – for example, 12% will implement measures to save energy and 13% to minimise waste.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, EU27)



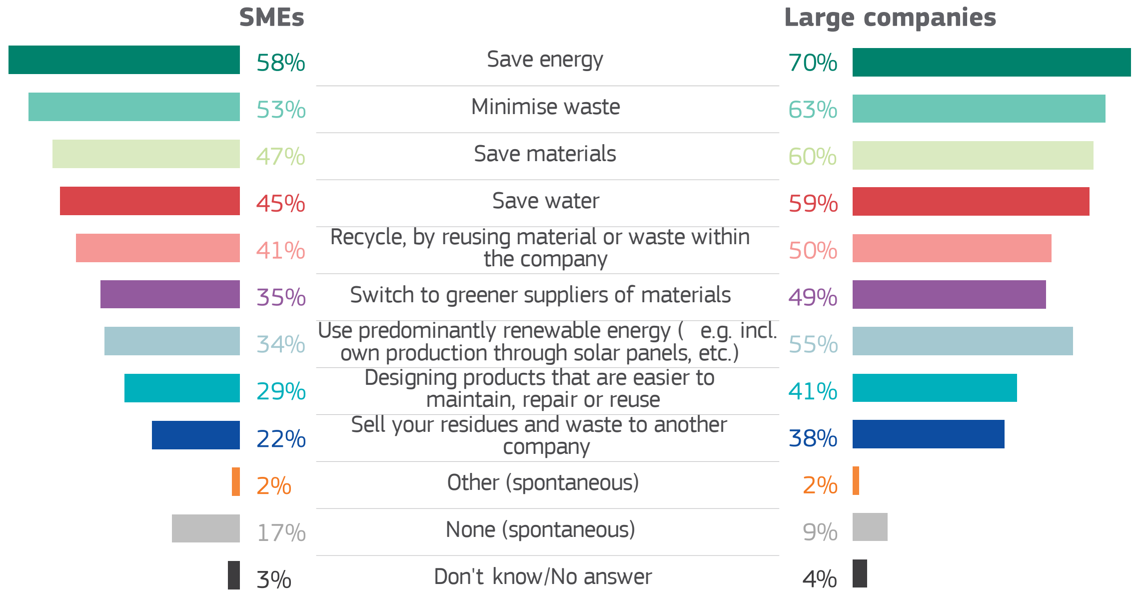
(%, EU27) Base: n=13 124 (SMEs)

SMEs vs large companies

Large companies (250+ employees) are not only more likely than SMEs to be undertaking the resource efficiency actions listed in the survey, but they are also **more likely to plan to implement additional resource efficiency actions**. For example, while 58% of SMEs plan to implement (additional) measure to save energy, this figure increases to 70% for large companies. Similarly, while 34% of SMEs, compared to 55% of large companies, plan to use predominantly renewable energy in the next two years.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by ecosystem

The proportion of SMEs that **will not undertake (additional) resource efficiency actions** in the next two years is the lowest in the industrial ecosystem of 'Energy – renewables' (8%). In contrast, about three in ten SMEs in the ecosystems 'Energy intensive industries' (31%) and 'Health' (30%) reply that they will not undertake any additional resource efficiency actions in the next two years.

Across most industrial ecosystems, the **most common resource efficiency actions to be implemented in the next two years** is saving (more) energy (selected by between 49% of SMEs in 'Health' and 70% in 'Proximity, social economy and civil security'; this action is followed by minimising waste (selected by between 42% of SMEs in 'Energy intensive industries' and 60% in both 'Proximity, social economy and civil security' and 'Energy – renewables'.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]
(Ecosystems, SMEs, EU27)

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	59	55	50	37	36	37	36	40	30	0	25	3
Agri-food	57	56	51	47	40	26	33	30	32	2	13	4
Construction	58	56	50	44	43	32	35	34	26	1	14	2
Cultural and creative industries	48	48	42	36	39	38	30	30	13	3	19	4
Digital	56	44	39	38	32	31	38	19	14	3	21	3
Electronics	63	57	40	32	35	41	38	44	18	1	15	8
Energy - renewables	71	60	57	56	50	50	57	54	30	1	8	3
Energy intensive industries	51	42	45	32	35	24	29	24	21	0	31	1
Health	49	53	50	46	27	38	48	30	25	1	30	4
Mobility - Transport - Automotive	56	55	50	47	42	35	34	31	27	4	16	1
Proximity, social economy and civil security	70	60	51	57	47	40	36	31	24	1	12	2
Retail	54	51	45	41	40	35	30	26	22	1	17	4
Textile	63	53	57	39	43	34	32	34	26	1	12	1
Tourism	62	56	48	52	49	36	46	29	26	0	11	4

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each ecosystem is shown in dark green and white font.
(%, EU27) Base: n=13 124 (SMEs)

Business demographics

As is the case for resource efficiency actions that SMEs are currently undertaking, **medium-sized companies** are more likely than **micro companies** to plan undertaking additional actions in the next two years. For example, 65% are planning to save energy, compared to 57% of micro companies. Similarly, 37% of medium-sized companies are planning to sell their residues and waste to another company, compared to 22% of micro companies.

The proportion of SMEs that are not planning to undertake additional resource efficiency actions in the next two years does not seem to vary much by SMEs' **turnover in 2023** – between 15% and 21% across all categories are not planning additional actions. In terms of individual actions, the largest differences are seen for planning to use predominantly renewable energy (from 30% for SMEs with up to €100 000 turnover in 2023 to 43% for those with a turnover value in 2023 of between €2 000 001 and €10 000 000).

High-growth SMEs (including gazelles) tend to be more likely than **weak/no growth SMEs** to plan to undertake additional resource efficiency actions in the next two years. For example, 32% of weak/no-growth companies (and 35% of negative-growth companies) plan to switch to greener suppliers of materials in the next two years, compared to 42% of gazelles and 46% of high-growth companies.

The results by **NACE sector** show that not only uptake of many of the measures to be more resource efficient is the lowest in the services sector, but also plans to implement more measures is the lowest in this sector. For example, 18% of SMEs in services, compared to 32% of SMEs in manufacturing are planning to sell their residues and waste to another company; the corresponding figure for SMEs in industry is 29% and it is 24% for those in retail. There are, however, also measures where there is no difference across the NACE sectors; for example, across all sectors, between 32% and 36% plan to use predominantly renewable energy sources in the next two years.

For some resource efficiency measures, SMEs that are both **selling products and services** are somewhat more likely than those selling only products or only services to plan implementing the measure in the next two years. For example, 40% of SMEs selling both products and services plan to switch to greener suppliers of materials in the next two years, compared to 32%-33% of SMEs that are selling only products or services.

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	58	53	47	45	41	35	34	29	22	2	17	3
Company size												
Micro (<10 empl.)	57	53	46	45	41	34	33	28	22	2	17	3
Small (10-49 empl.)	62	56	52	47	43	38	44	32	33	2	12	2
Medium-sized (50-249 empl.)	65	57	55	48	46	39	47	32	37	2	10	3
Large (250-499 empl.)	64	57	55	54	49	42	50	39	37	2	10	4
Large (500+ empl.)	80	73	68	68	52	59	63	45	40	1	7	4
Company turnover (2023)												
Up to €100 000	57	55	48	48	40	36	30	27	19	2	17	2
€100 001-€500 000	59	54	47	49	44	35	34	30	23	2	15	2
€500 001-€2 000 000	60	56	48	41	40	36	36	30	27	1	15	2
€2 000 001-€10 000 000	63	54	48	43	41	38	43	30	26	3	15	4
More than €10 000 000	50	39	39	38	31	16	36	31	18	1	21	6
Company growth												
Gazelles	62	57	50	53	45	46	42	32	26	2	14	1
High-growth companies	64	57	49	49	45	42	40	32	26	2	14	2
Weak/no-growth companies	55	52	46	43	40	32	33	28	21	2	17	3
Negative-growth companies	62	53	53	50	42	35	31	29	23	2	16	2
Sector of activity (NACE)												
Manufacturing (C)	57	54	50	44	41	31	36	34	32	2	14	3
Industry (B/D/E/F)	58	56	51	45	44	35	36	36	29	1	15	2
Retail (G)	57	56	49	46	44	37	32	31	24	1	15	3
Services (H/I/J/K/L/M)	58	50	44	44	39	34	34	24	18	2	18	3
Selling products/services												
Products	57	50	43	39	40	32	34	27	22	2	17	4
Services	60	53	47	48	41	33	33	27	18	2	17	2
Both	56	56	50	45	44	40	37	33	30	1	15	2

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by EU Member State

The proportion of SMEs that plan to implement (further) **energy savings** in the next two years ranges from 14% in Malta to 84% in Spain. In 19 Member States, this action is the (joint) most-frequently mentioned future action.

Between 12% of SMEs in Ireland and 85% in Spain will implement (further) measures to **minimise waste**. In seven Member States, this is the most-mentioned future measure; this applies, for example, to Spain, but also Belgium (80%) and Czechia (65%).

In eight Member States, at least half of SMEs report that they plan to take measures **to save materials**, with the highest share found in Spain (81%), followed by Lithuania (76%). Similarly, in seven Member States, at least half of SMEs report that they plan to take measures **to save water**, with the overall highest share observed again in Spain (79%).

It was noted in Section 1.1 that 71% of SMEs in Spain are undertaking five or more of the resource efficiency actions listed in the survey. The results for the current question show that SMEs in Spain are also among the most likely to plan to implement (or extend) various resource efficiency measures in the next two years. As such, the proportion of SMEs **not planning to implement additional resource efficiency measures** in the next two years is the lowest in Spain (2%), followed by Slovakia (7%), Lithuania (8%) and Belgium (9%). In Slovenia, on the other hand, 41% of SMEs are not planning to implement additional resource efficiency measures; this figure is also high in Finland (39%).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	58	53	47	45	41	35	34	29	22	2	17	3
BE	77	80	62	57	48	52	59	36	30	0	9	1
BG	53	57	49	48	31	35	29	27	23	1	13	6
CZ	60	65	54	50	41	35	33	37	29	2	16	0
DK	56	46	42	37	38	29	30	21	21	4	24	4
DE	57	43	46	35	36	36	42	26	19	3	20	2
EE	51	42	43	37	31	23	15	21	12	1	20	1
IE	29	12	21	9	21	18	17	16	7	6	10	5
EL	68	51	51	49	41	43	40	28	26	0	17	0
ES	84	85	81	79	79	65	50	56	36	0	2	1
FR	66	62	42	54	43	41	28	28	28	1	11	2
HR	42	43	33	31	23	21	25	18	14	2	26	4
IT	50	41	41	37	35	21	31	27	15	1	22	5
CY	50	37	35	25	31	28	38	14	11	2	23	1
LV	44	34	44	32	14	23	17	20	20	3	31	4
LT	80	73	76	72	37	55	46	30	38	1	8	0
LU	33	22	23	20	29	18	19	26	18	8	17	4
HU	46	39	41	38	24	19	32	20	16	2	31	3
MT	14	15	16	11	11	19	24	6	8	14	28	15
NL	43	43	33	24	34	25	37	22	19	2	22	7
AT	50	53	39	33	38	10	32	26	26	1	12	1
PL	49	44	41	42	34	27	21	17	19	1	22	2
PT	18	25	12	10	17	13	20	5	8	9	16	11
RO	63	55	54	50	45	43	42	36	29	1	10	1
SI	22	20	18	14	20	16	21	8	8	8	41	0
SK	81	79	71	74	53	47	30	32	30	2	7	0
FI	42	34	29	16	23	17	19	15	14	2	39	1
SE	60	59	50	40	54	38	41	33	20	3	18	0

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each country is shown in dark green and white font.

(%, EU27) Base: n=13 124 (SMEs)

Non-EU countries

In line with the results for EU Member States, **saving energy and minimising waste are also the most-mentioned additional (future) resource efficiency actions in most non-EU countries surveyed**. For example, in the US, 77% of SMEs plan to take (additional) measures to reduce waste and 74% to save energy, compared to, for example, 28% that plan to use predominantly renewable energy.

On average, across the EU, 17% of SMEs report that they are **not planning to take any (additional) resource efficiency actions** in the next two years. A similar share is observed in **Iceland** (16%), **Norway** (16%) and **Türkiye** (19%). SMEs in **the UK** (9%) and **the US** (9%), on the other hand, are less likely than EU SMEs (on average) to not be planning (additional) resource efficiency actions in the next two years, while the opposite is seen for SMEs in **Switzerland** (29% 'not planning'), **North Macedonia** (32%) and **Serbia** (25%). SMEs in Switzerland, however, are already among the most likely to be already taking actions (see previous section), while thus does not apply to SMEs in North Macedonia.

Caution should be exercised when interpreting the results of Albania, Moldova and Montenegro, due to the smaller number of interviews having been conducted in these countries (between 93 and 105 per country).

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	58	53	47	45	41	35	34	29	22	2	17	3
UK	65	63	42	35	58	54	26	30	16	1	9	3
IS	40	50	36	22	31	23	25	16	16	5	16	12
NO	52	59	47	22	50	44	30	37	22	1	16	2
CH	41	33	27	21	26	25	31	14	12	6	29	5
ME	51	52	29	36	28	10	20	9	14	0	13	3
MD	51	16	47	42	13	14	23	9	15	9	17	2
MK	23	21	18	12	10	9	16	8	15	8	32	5
AL	21	11	9	12	20	4	12	5	5	0	48	6
RS	32	28	22	19	22	13	21	8	19	2	25	2
TR	53	51	59	47	44	50	27	45	27	0	19	4
US	74	77	70	67	68	55	28	50	35	0	9	1

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking measure for each country is shown in dark green and white font.

(%, non-EU countries) Base: n=3 783 (SMEs)

Current and planned resource efficiency actions

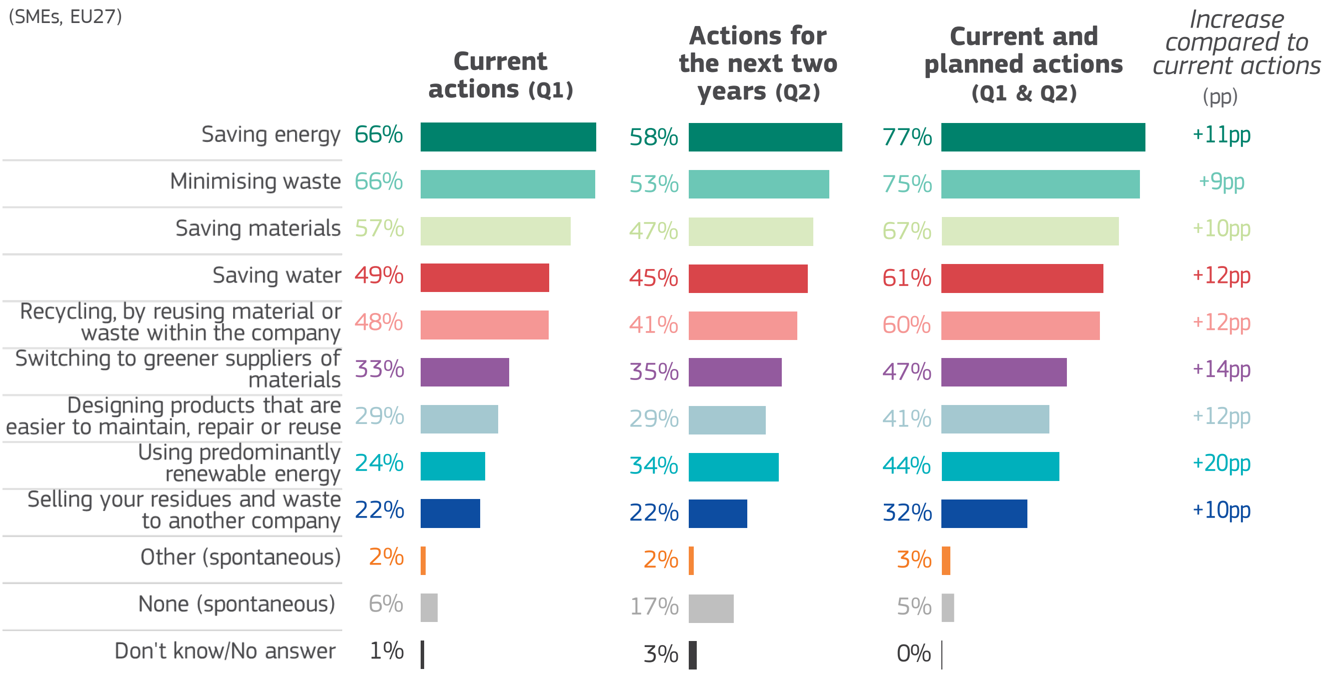
In the next figure, the results for the question about current resource efficiency actions taken by SMEs and that about additional resource efficiency measures to be implemented in the next two years are combined. By combining the results of these questions, **a picture is presented of the total number of SMEs that would be taking each of the resource efficiency actions in two years' time** (bar chart at the right-hand side in the figure below).

For example, 66% of SMEs reply that they are currently taking measures to save energy and 58% say that, in the next two years, they will either start saving energy or will implement additional energy saving measures in their company. In two years' time, this means that there should be, in total, 77% of SMEs that are saving energy. This figure of 77% represents an increase of 11 percentage points compared to the proportion of SMEs currently already saving energy.

For most resource efficiency measures listed in the survey, the share of SMEs planning to take action (second chart) is either smaller or equal to the share already taking action (first chart). A different picture, however, emerges for **using predominantly renewable energy** (e.g. including own production through solar panels, etc.): 24% of SMEs reply that they are already using predominantly renewable energy, compared to 34% that say that, in the next two years, they will switch to predominantly renewable energy. In two years' time, this means that there should be, in total, 44% of SMEs that are using predominantly renewable energy (an. increase of 11 percentage points compared to the proportion of SMEs already using predominantly renewable energy).

Q1 What actions is your company undertaking to be more resource efficient?
Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

As discussed in Section 1.1, 6% of SMEs reply that they are not undertaking any of the resource efficiency actions listed in the survey. Of these SMEs not currently undertaking action, 69% are also not planning to start with the implementation of resource efficiency actions in the next two years. This means that, **in two years' time, there will continue to be a small number of EU SMEs (5%) that do not undertake resource efficiency actions**.

At the **individual country level**, this share not taking, nor planning resource efficiency measures remains at 10% - or higher – in six Member States: Estonia (10%), Finland (11%), Germany (11%), Romania (14%), Lithuania (15%) and Hungary (19%).

Q1 What actions is your company undertaking to be more resource efficient?
Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

(SMEs, EU27)

% "No actions" (currently and not planning to implement)

(%, EU27) Base: n=13 124 (SMEs)

1.3. Using renewable energy

In Section 1.1, it was notes that 24% of EU SMEs report that one of the resource efficiency measures taken by their company is using predominantly renewable energy sources (e.g. including own production trough solar panels, etc.); this figure represents an increase of five percentage points compared to 2021.

SMEs in this survey were also directly asked whether their company uses renewable energy either by generating renewable energy onsite or by purchasing energy from a renewable energy supplier. In line with the results discussed in Section 1.1, a majority of EU SMEs (63%) confirm that they do not use renewable energy sources.

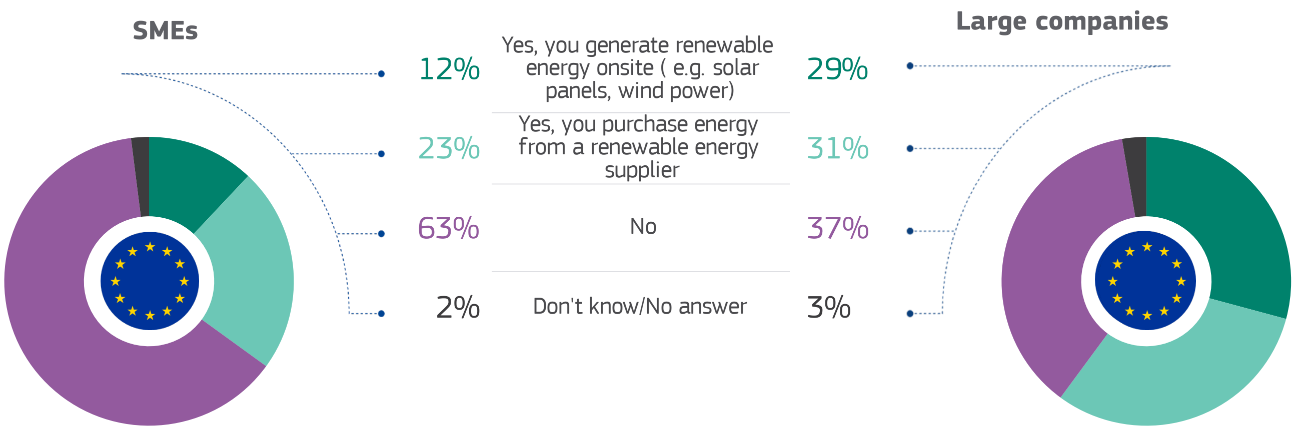
Somewhat more than one in ten SMEs (12%) generate renewable energy onsite (e.g. solar panels, wind power) and 23% report to purchase energy from a renewable energy supplier (but do not generate renewable energy onsite).

SMEs vs large companies

Energy consumption form renewable energy sources is **significantly more common in large companies**, with 31% generating renewable energy onsite (e.g. solar panels, wind power) and 29% purchasing energy from a renewable energy supplier (in comparison with 12% and 23% of SMEs, respectively).

N1a Does your company use renewable energy sources?

(SMEs vs large companies, EU27)



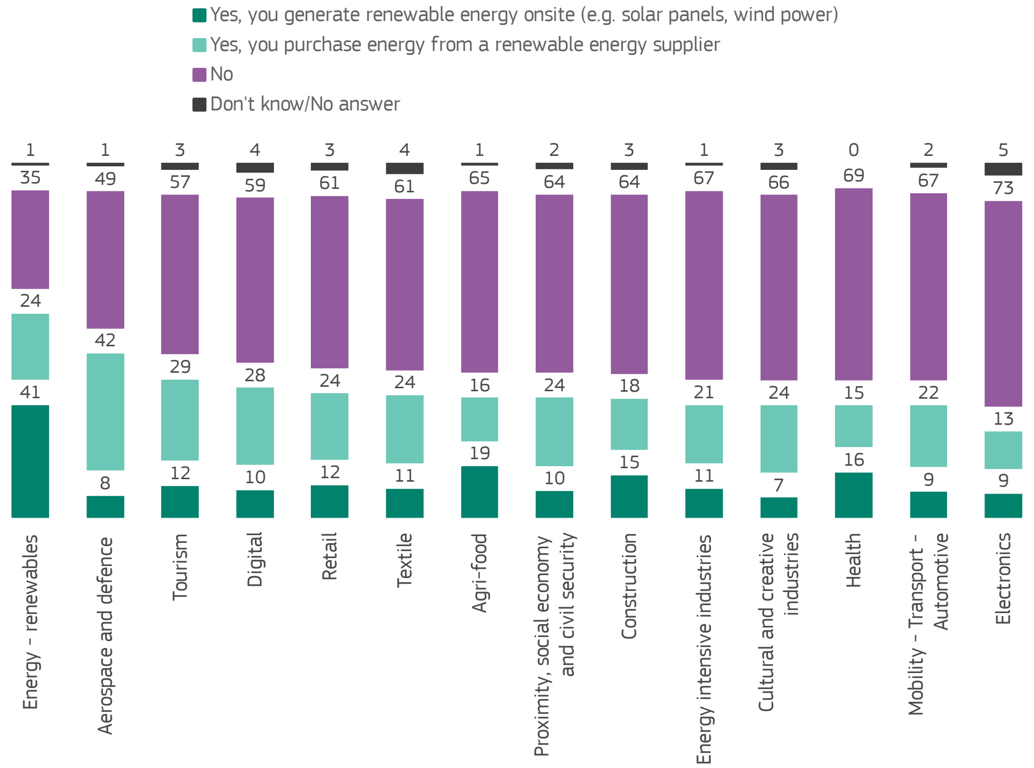
(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by ecosystem

SMEs in the industrial ecosystem 'Energy – renewables' stand out with 41% saying that they **generate renewable energy onsite (e.g. solar panels, wind power)**. In the other ecosystems, this figure varies between 7% for SMEs in 'Cultural and creative industries' and 19% in 'Agri-food'. The share of SMEs reporting that they **purchase energy from a renewable energy supplier** ranges from 13% in 'Electronics' to 42% in 'Aerospace and defence'. SMEs in 'Electronics' (73%) are overall the most likely to report that they do not generate renewable energy, nor purchase renewable energy.

N1a Does your company use renewable energy sources?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Business demographics

Larger SMEs are also more likely to generate renewable energy onsite, with 28% of medium-sized companies saying this, in contrast with 20% of small companies and 11% of micro companies. A similar trend is looking at SMEs' turnover: 18% of SMEs with a turnover of between €2 000 000 and €10 000 000 say that they generate energy onsite, in comparison with 11% of SMEs with a turnover of up to €100 000 or between €100 000-€500 000.

About one in six **high-growth companies** (18%) generate renewable energy onsite (e.g. solar panels, wind power); this figure is lower for gazelles (8%) and for weak/no-growth and negative-growth companies (both 11%). Across all types of growth companies, between 21% and 24% report buying energy from a renewable energy supplier.

Variations across **NACE sectors** are also evident, with 18% of SMEs in industry indicating they generate renewable energy onsite, compared to 14% in manufacturing, 12% in the retail sector, and 9% in the services sector. This higher percentage for industrial SMEs is largely attributed to the electricity, gas, steam, and air conditioning supply sector, where 60% of SMEs report generating their own renewable energy onsite.

Finally, **SMEs selling both products and services** are somewhat more likely than their counterparts selling only products or only services to be generating renewable energy onsite. (15% vs 10%-11%).

N1a Does your company use renewable energy sources?
(SMEs, EU27)

	Yes, you generate renewable energy onsite (e.g. solar panels, wind power)	Yes, you purchase energy from a renewable energy supplier	No	Don't know/No answer
EU27 (SMEs)	12	23	63	2
Company size				
Micro (<10 empl.)	11	23	64	2
Small (10-49 empl.)	20	24	54	3
Medium-sized (50-249 empl.)	28	27	44	2
Large (250-499 empl.)	24	31	44	1
Large (500+ empl.)	38	30	27	5
Company turnover (2023)				
Up to €100 000	11	17	70	3
€100 001-€500 000	11	24	63	2
€500 001-€2 000 000	13	21	63	3
€2 000 001-€10 000 000	18	27	51	4
More than €10 000 000	7	41	52	0
Company growth				
Gazelles	8	23	68	1
High-growth companies	18	21	59	3
Weak/no-growth companies	11	24	64	2
Negative-growth companies	11	22	63	4
Sector of activity (NACE)				
Manufacturing (C)	14	20	64	2
Industry (B/D/E/F)	18	18	61	2
Retail (G)	12	23	62	3
Services (H/I/J/K/L/M)	9	25	63	2
Selling products/services				
Products	11	23	65	2
Services	10	23	65	2
Both	15	24	58	4

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

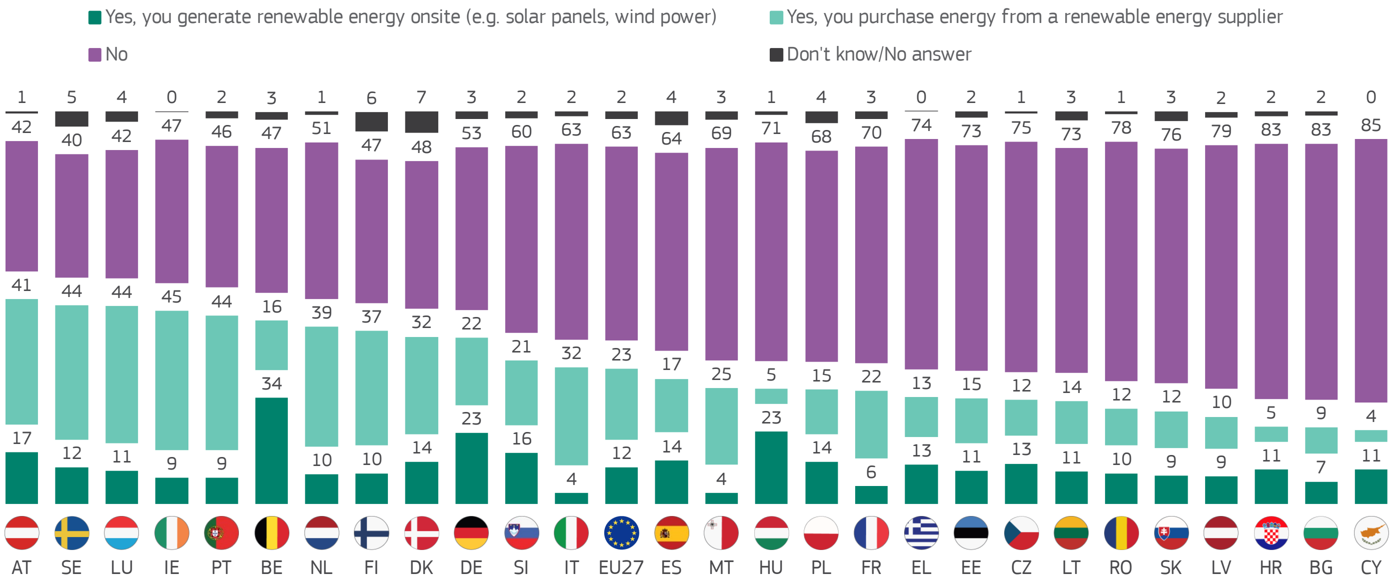
Results by EU Member State

SMEs in Belgium (34%) are overall the most likely to report that they **generate renewable energy onsite** (e.g. solar panels, wind power); they are followed by SMEs in Germany (23%) and Hungary (23%). In five Member States, more than 40% of SMEs reply that they **purchase their energy from a renewable energy supplier**: Austria (41%), Luxembourg (44%), Portugal (44%), Sweden (44%) and Ireland (45%).

Across a majority of the Member States, however, more than 50% of SMEs do not generate renewable energy, nor purchase renewable energy. The overall highest figures for this group are seen in Croatia (83%), Bulgaria (8%) and Cyprus (85%).

N1a Does your company use renewable energy sources?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Non-EU countries

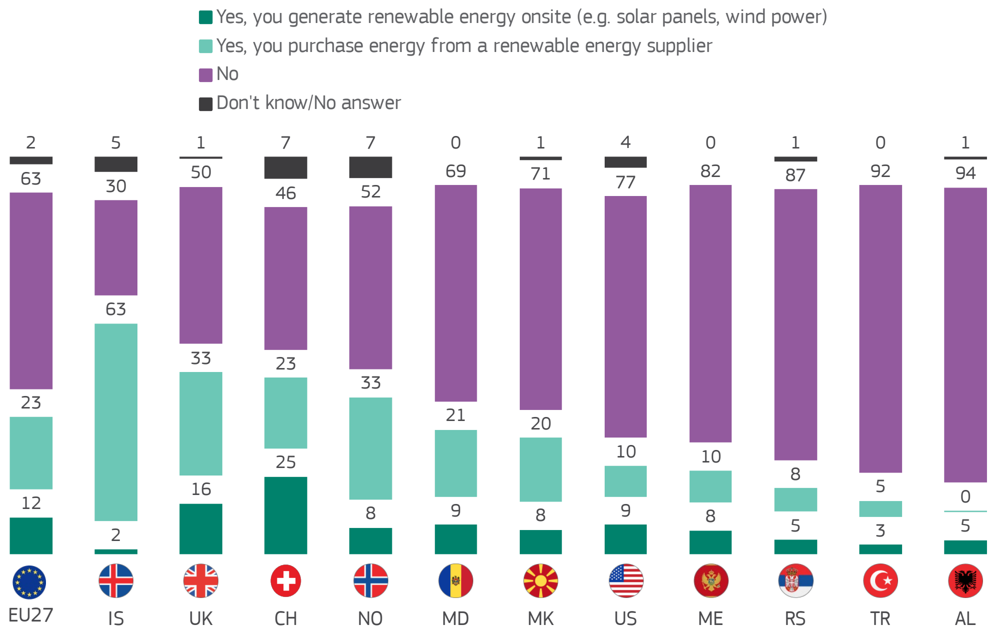
Compared to EU SMEs (on average), SMEs in **Switzerland** (25%) and **the UK** (16%) are more likely to generate renewable energy onsite (e.g. solar panels, wind power). In all other non-EU countries surveyed, less than one in ten SMEs report generating renewable energy onsite.

SMEs in **Iceland** stand out with 63% saying they purchase energy from a renewable energy supplier. In **the UK** and **Norway**, 33% of SMEs use a renewable energy supplier.

In line with the results discussed in Section 1.1, few SMEs in countries, such as **Albania** and **Türkiye**, report either generating energy on site or purchasing energy from a renewable energy

N1a Does your company use renewable energy sources?

(SMEs, non-EU countries)



(%, non-EU countries) Base: n=3 783 (SMEs)

Share of energy generated onsite

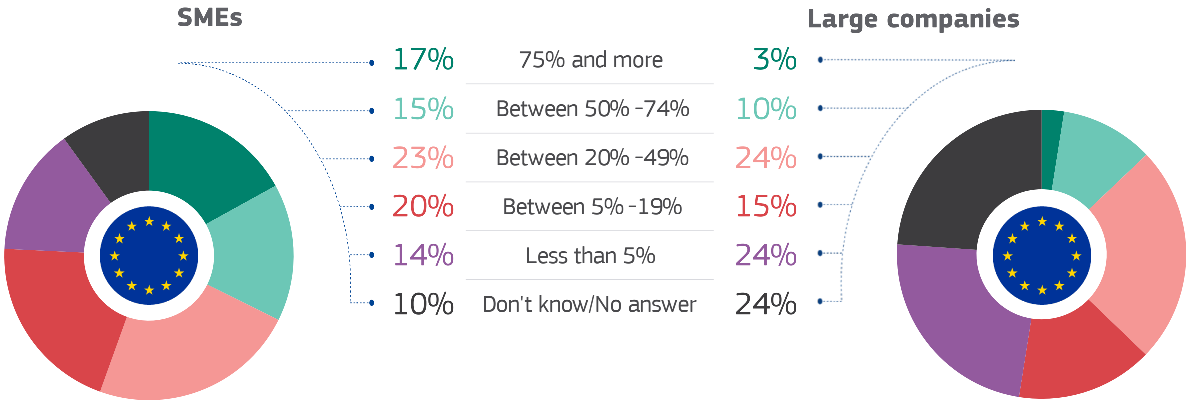
Companies that indicated generating their own renewable energy onsite, such as through solar panels or wind power, were subsequently asked **what proportion of their total energy consumption is derived from these renewable sources**. To this question, **17% of SMEs generating renewable energy say that 75% or more of their energy consumed in generated onsite, 15% say it is between 50% and 74%** and 23% that it is between 5% and 19%. Finally, 14% of these SMEs say that less than 5% of their energy consumed is generate onsite and 10% do not know how much energy is generate on site.

Although SMEs are less likely than large companies to generate renewable energy onsite (12% vs 29%, respectively), they are more likely to be producing a larger share of their energy consumed onsite. For example, 32% of SMEs report that at least 50% of energy consumed in their company is generated on site; the corresponding figure for large companies is 13%.

Due to the smaller base size for this question, results are not discussed in more depth.

N1b What share of energy consumed in your company is generated onsite (e.g. via solar panels, wind power)?

(SMEs vs large companies, EU27)



(%, EU27) Base: n=2 258 (SMEs) & n=257 (Large companies) – **Companies generating renewable energy onsite**

1.4. Investment in resource efficiency

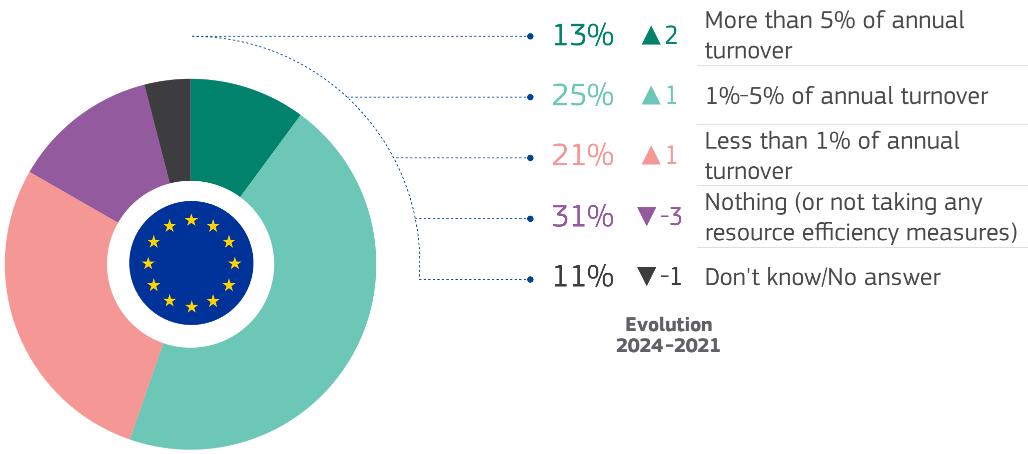
One way to study how resource efficient SMEs are, is by asking about the type of resource efficiency measures being implemented by these SMEs (nine of this type of measures were discussed in the previous sections). An alternative way is to ask SMEs how much they have invested (on average, per year) to become more resource efficient.

SMEs that reported taking resource efficiency actions were asked **how much they have invested, on average per year, and this over the past two years, to be more resource efficient**. In the analysis below, the results are presented taking into account all SMEs surveyed, meaning that it is assumed that SMEs that are not taking resource efficiency actions also have not made investments to be more resource efficient.

Of all SMEs surveyed across the EU, **13% reply that they have invested, on average, more than 5% of their annual turnover over the past two years** to become more resource efficient and **25% say that the investment amounted to between 1% and 5% of their annual turnover, on average**. About one in five (21%) SMEs say that the investment in resource efficiency was less than 1% of their annual turnover and 31% reply that nothing was invested (or that no resource efficiency actions are being taken). Finally, 11% of SMEs reply that they do not know how much was invested in resource efficiency measures in the past two years. The results for this question are **in line with those observed in 2021**.

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

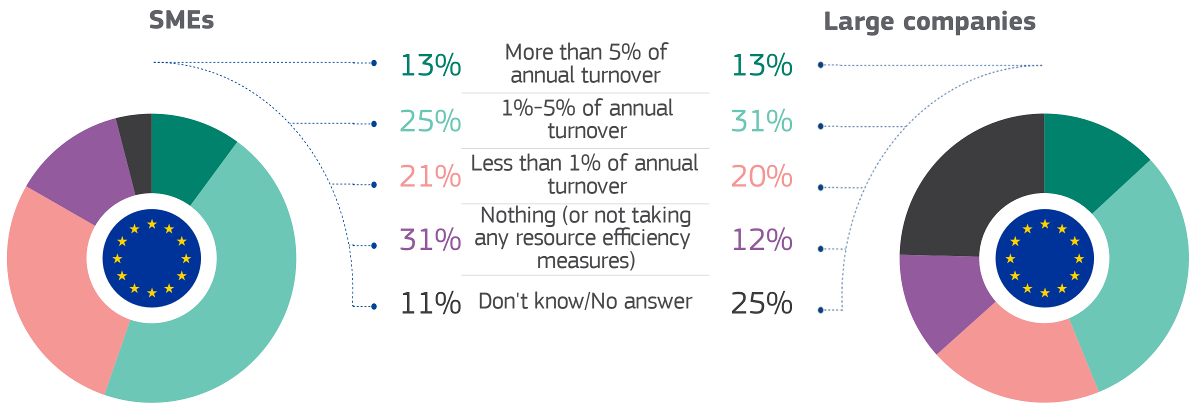
SMEs vs large companies

As noted above, **13% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient, this proportion is the same for large companies**. However, the share of companies that have invested between 1% and 5%, on average, of their annual turnover is somewhat higher for large companies (31%) than for SMEs (25%). About equal shares (20%-21%) say that the investment in resource efficiency was less than 1% of their annual turnover.

Among SMEs, 31% reply that nothing was invested (or that no resource efficiency actions are being taken); this figure is 12% for large companies. It should, however, also be noted that there is a larger degree of uncertainty among respondents in large companies with 25% saying that they do not know how much was invested in resource efficiency measures in the past two years; this proportion is lower for SMEs (11%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs vs large companies, EU27)



(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

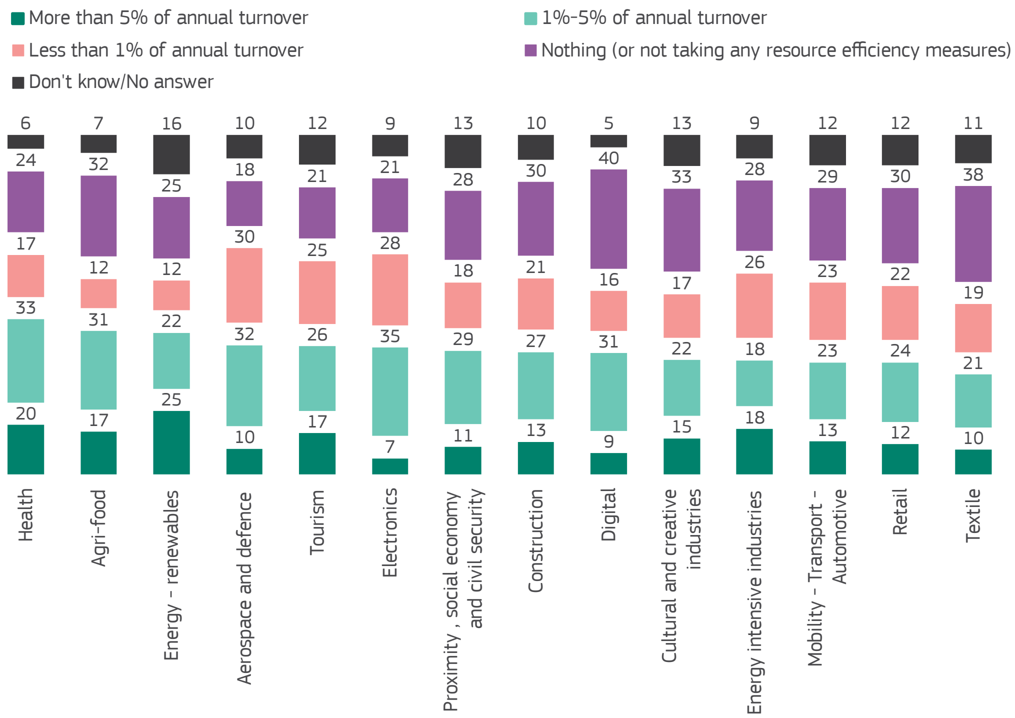
Results by ecosystem

Between 7% of SMEs in the industrial ecosystems of ‘Electronics’ and 25% of those in ‘Energy – renewables’ reply that they have invested, on average, **more than 5% of their annual turnover over the past two years** to become more resource efficient. The proportion having invested between 1% and 5% of their annual turnover is the lowest in ‘Energy intensive industries’ (13%), but it is the highest in ‘Electronics’ (35%).

The chart below also shows that the total proportion of SMEs having **invested at least 1% (or more) of their turnover in the past two years** to become more resource efficient is the highest in the industrial ecosystems of ‘Health’, ‘Agri-food’ and ‘Energy – renewables’, but this proportion is significantly lower in ‘Textile’.

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Business demographics

Smaller SMEs (in terms of **number of employees**) are more likely to reply that, over the past two years, no resource efficiency investments were made (or that no resource efficiency actions are being undertaken): from 31% for micro companies to 15% for medium-sized companies. The share of SMEs that have invested, on average, more than 5% of their annual turnover over the past two years, however, does not vary significantly across SMEs of different sizes (13%-15%).

The proportion of SMEs in this situation also decreases with **turnover** – from 36% of SMEs with a turnover of less than €100 000 in 2023 down to 21%-23% for SMEs with more than €2 000 000 in turnover.

High-growth companies (including gazelles) are somewhat more likely to report that that they have invested, on average, more than 5% of their annual turnover over the past two years (16% vs 12%-13% for no-growth or negative-growth SMEs). Among **gazelles**, however, there is also a share of 35% reporting that, over the past two years, no resource efficiency investments were made (or that no resource efficiency actions are being undertaken); this share is lower for older high-growth companies (27%).

An analysis by **NACE sector** shows that 17% of SMEs in manufacturing reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient. In manufacturing, industry and industry, while 33% in services.

Additionally, it can be observed that SMEs that are only **selling services** are more likely than those **selling products** (or both products and services) not to have invested or having taken actions (29% vs 21%-25%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)

	More than 5% of annual turnover	1%-5% of annual turnover	Less than 1% of annual turnover	Nothing (or not taking any resource efficiency measures)	Don't know/No answer
EU27 (SMEs)	13	25	21	30	11
Company size					
Micro (<10 empl.)	13	25	21	31	11
Small (10-49 empl.)	15	29	20	20	16
Medium-sized (50-249 empl.)	14	31	22	15	18
Large (250-499 empl.)	13	31	20	15	21
Large (500+ empl.)	13	31	18	7	30
Company turnover (2023)					
Up to €100 000	14	23	20	36	7
€100 001-€500 000	13	27	21	32	7
€500 001-€2 000 000	13	28	23	27	10
€2 000 001-€10 000 000	17	28	25	21	10
More than €10 000 000	10	26	27	23	15
Company growth					
Gazelles	16	26	20	35	3
High-growth companies	16	29	21	27	7
Weak/no-growth companies	12	24	20	30	13
Negative-growth companies	10	24	20	37	8
Sector of activity (NACE)					
Manufacturing (C)	17	28	19	27	10
Industry (B/D/E/F)	13	28	19	29	10
Retail (G)	12	26	22	28	12
Services (H/I/J/K/L/M)	12	24	20	33	11
Selling products/services					
Products	12	27	21	28	12
Services	13	23	19	35	10
Both	14	27	23	25	11

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by EU Member State

The proportion of SMEs having made **resource efficiency investments of 5% or more** of their annual turnover, on an annual basis, over the past two years ranges from 4% in Luxembourg to 21% in Ireland. In a majority of the Member States, at least one in ten SMEs have invested at least 5% of their annual turnover, over the past two years, to be more resource efficient.

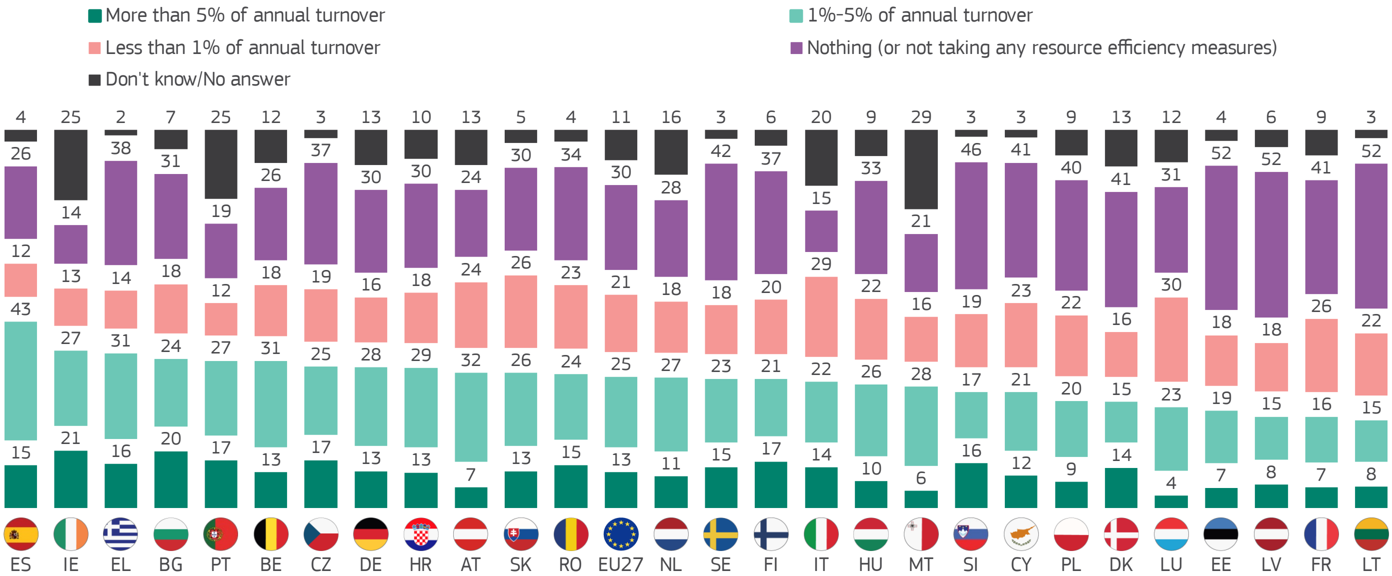
The proportion of SMEs having invested between 1% and 5% of their annual turnover, on an annual basis, over the past two years is the lowest in Lithuania, Latvia and Denmark (all 17%) and the highest in Spain (43%).

The **total proportion of SMEs that have invested at least 1% of their annual turnover** on average, over the past two years, (the sum of the dark and light green bars in the chart below) varies between 22% in Lithuania and 58% in Spain.[10] In Greece and Ireland, close to one in two SMEs (both 47%) have invested at least 1% of their annual turnover.

The largest shares of SMEs that have **not made any investment in resource efficiency** (or are not undertaking any action to become more resource efficient) are observed in Estonia, Latvia and Lithuania (all 52%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

[10] Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

Non-EU countries

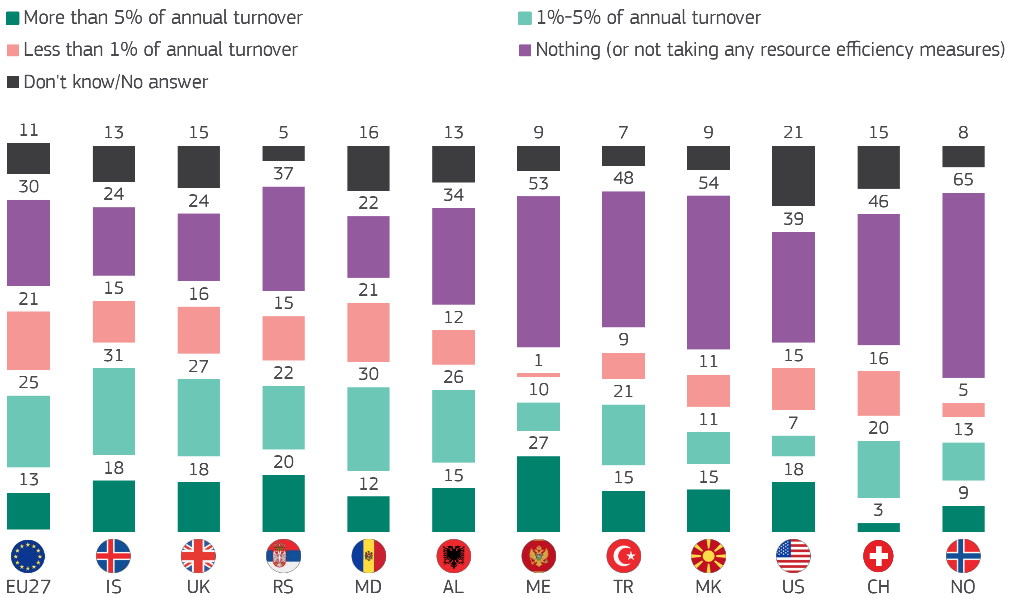
In the EU, 13% of SMEs reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient. In **the US**, this figure is somewhat higher at 18%. SMEs in the US (39%), however, are also more likely than company in the EU (26%) to say that they have not invested at all in resource efficiency measures over the past two years.

In **Iceland** and **the UK**, one in six SMEs (both 18%) reply that they have invested, on average, more than 5% of their annual turnover over the past two years to become more resource efficient and roughly three in ten (27%-31%) say that the investment amounted to between 1% and 5%, on average, of their annual turnover. In **Serbia**, 20% of SMEs have invested, on average, more than 5% of their annual turnover over the past two years and 22% have invested between 1% and 5%, on average, of their annual turnover.

SMEs in **Switzerland** are overall the least likely to reply that they have invested more than 5% of their annual turnover over the past two years to become more resource efficient (3% vs 9%-27% in the other non-EU countries), but SMEs in **Norway** are the most likely to answer that they have not invested at all in resource efficiency measures over the past two years (65% vs 22%-54% in the other non-EU countries).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, non-EU countries)



	EU27	IS	UK	RS	MD	AL	ME	TR	MK	US	CH	NO
Don't know/No answer	11	13	15	5	16	13	9	7	9	21	15	8
Nothing (or not taking any resource efficiency measures)	30	24	24	37	22	34	53	48	54	39	46	65
Less than 1% of annual turnover	21	15	16	15	21	12	1	9	11	15	16	5
1%-5% of annual turnover	25	31	27	22	30	26	10	21	11	7	20	13
More than 5% of annual turnover	13	18	18	20	12	15	27	15	15	18	3	9

(%, non-EU countries) Base: n=3 783 (SMEs)

Trend compared to 2021

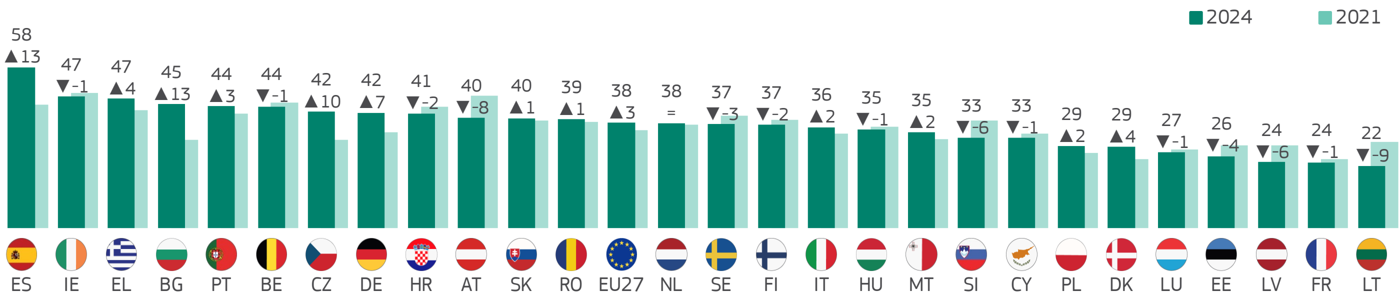
The chart below presents the trend compared to 2021 in the proportion of SMEs that have **invested at least 1% of their annual turnover** on resource efficiency measures, per year, over the past two years. On average, across the EU, this proportion has slightly increased to 38% (+3 pp compared to 2021).

It was noted in Section 1.1 that, in about half of the Member States, the proportion of SMEs that are not taking any resource efficiency measures has decreased since 2021. In line with this, in several Member States, there is **an increase, compared to 2021, in the proportion of SMEs that have invested at least 1% of their annual turnover on resource efficiency measures in the past two years**. The largest increases in this proportion are observed in Spain (+13 pp, to 58%), Bulgaria (+13 pp, to 45%), Czechia (+10 pp, to 42%) and Germany (+7 pp, to 42%). There are, however, also some Member States where **SMEs are now less likely to answer that they have invested** at least 1% of their annual turnover on resource efficiency measures over the past two years: Austria (-8 pp, to 40%), Slovenia (-6 pp, to 33%), Latvia (-6 pp, to 24%) and Lithuania (-9 pp, to 22%).

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)

% At least 1% annual turnover



(%, EU27) Base: n=13 124 (SMEs)

▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

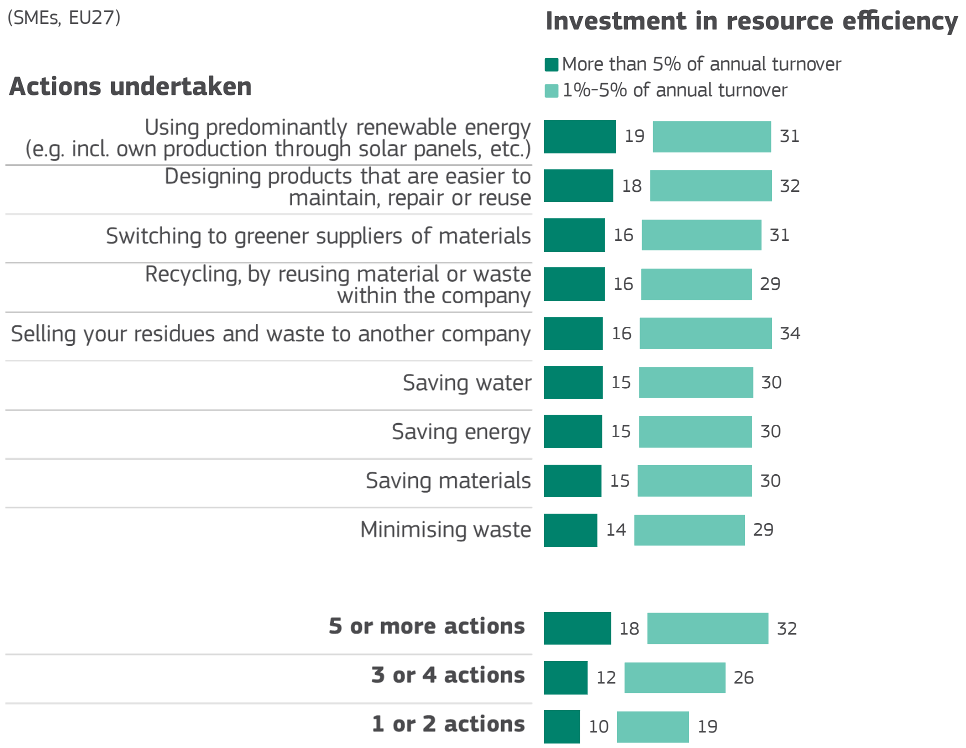
Level of investment and type of resource efficiency action taken

A considerable share of SMEs across the EU have invested at least 1% of their annual turnover on resource efficiency measures over the past two years. In Section 1.1, it was noted that most EU SMEs are taking more than one type of action to increase their resource efficiency. The chart below tries to shed light on differences in investment by type of resource efficiency action taken. Note that some caution is needed to interpret the differences across the types of resource efficiency actions, due to the fact that SMEs tend to take multiple actions.

That said, the results appear to show that **SMEs reporting to use predominantly renewable energy are somewhat more likely to have invested**, on average, more than 5% of their annual turnover over the past two years to become more resource efficient compared to, for example, SMEs that report that saving materials or saving waste are resource efficiency measures they take, (19% vs 14%-15%).

The bottom panel of the chart show that the **share of SMEs that have invested**, on average, more than 5% of their annual turnover over the past two years, or having invested between 1% and 5%, on average, of their annual turnover **increases with the number of resource efficiency actions taken by these SMEs** over the past two years. For example, 10% of SMEs that have taken one or two types of resource efficiency measures in the past two years, have also invested more than 5% of their annual turnover over the past two years on becoming more resource efficient; this share increases to 18% for SMEs that have implemented five or more resource efficiency measures in the past two years.

Q1 What actions is your company undertaking to be more resource efficient?
Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

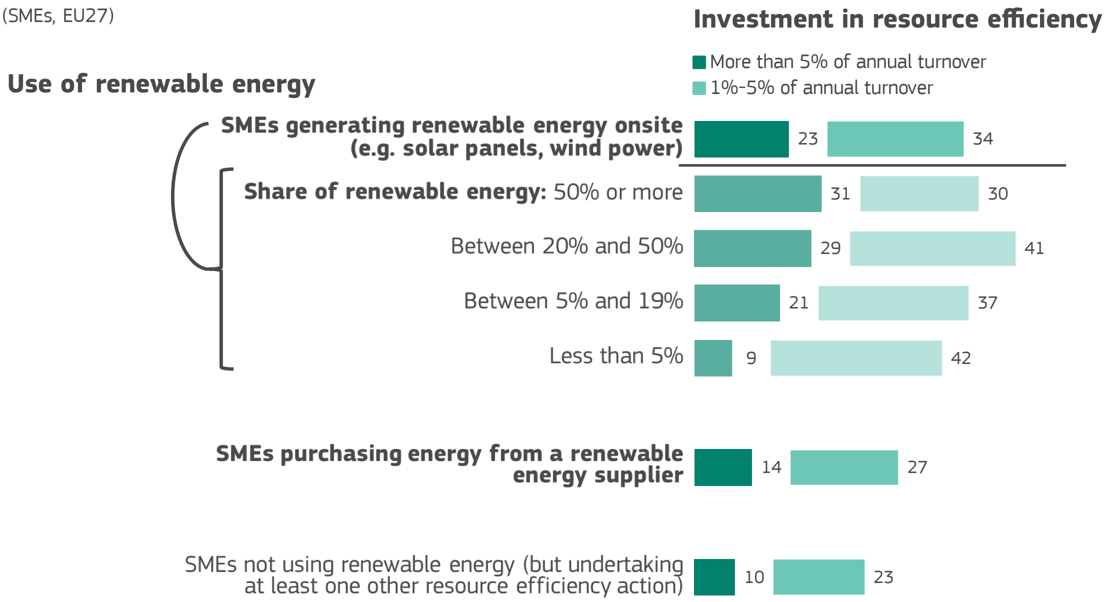
To collect further evidence on the association between using renewable energy and the level of investment SMEs have made in becoming more resource efficient, a similar chart as the one above was prepared looking at SMEs replies to the question whether they generate renewable energy onsite or whether they purchase energy from a renewable energy supplier.

The average figures for **SMEs that generate renewable energy onsite** (e.g. solar panels, wind power) show that 23% of them have **invested more than 5% of their annual turnover** over the past two years to become more resource efficient, and 34% have invested between 1% and 5% of their annual turnover. The **corresponding figures are lower for SMEs that purchase energy from a renewable energy supplier** (and do not generate renewable energy onsite) (24% and 27%, respectively) **and SMEs that are not using renewable energy** (but are taking other measures to become more resource efficient) (10% and 23%, respectively).

The chart below further shows that the level of investments SMEs make in resource efficiency also **varies by the share of renewable energy produced onsite**: while 29% of SMEs that produce at least 50% of their energy consumed onsite via solar panels, wind energy etc. have invested more than 5% of their annual turnover over the past two years to become more resource efficient, this figure is just 9% for SMEs producing less than 5% of their energy consumed onsite.

N1a Does your company use renewable energy sources?
Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

1.5. Strategy to become climate neutral or negative

Companies were also asked whether they have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative.

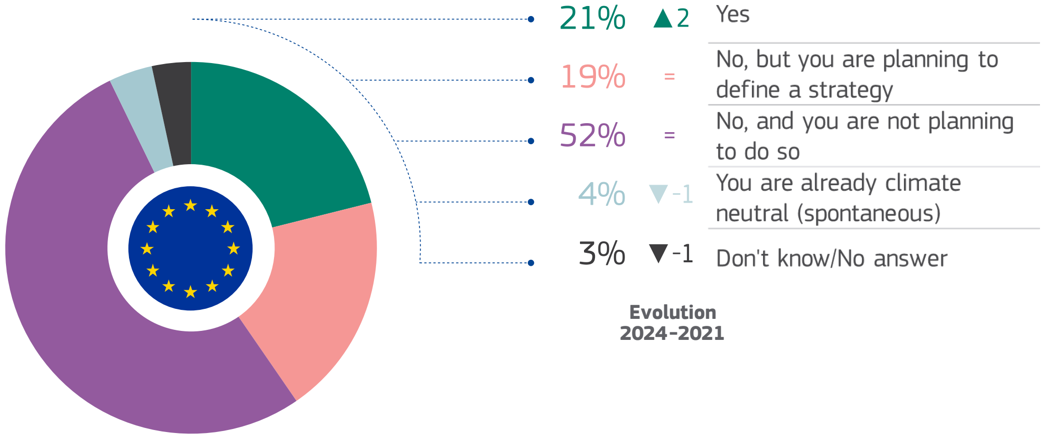
About seven in ten EU SMEs do not (yet) have a **concrete strategy in place to reduce their carbon footprint and become climate neutral or negative**. Some of the SMEs in this group, however, are planning to define a strategy.

The chart below shows that **21% of SMEs have a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative and 4% report that they are already climate neutral. Another **19% of SMEs reply that they do not have a carbon reduction strategy in place but are planning to define one**. These figures do not represent any significant change compared to the figures **observed in 2021**.

A slim majority (52%) of respondents answer that their SME does not have a concrete strategy in place to reduce their carbon footprint and is also **not planning to define one**. A handful of respondents (3%) reply that they do not know if a strategy has been defined or will be defined.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(SMEs, EU27)



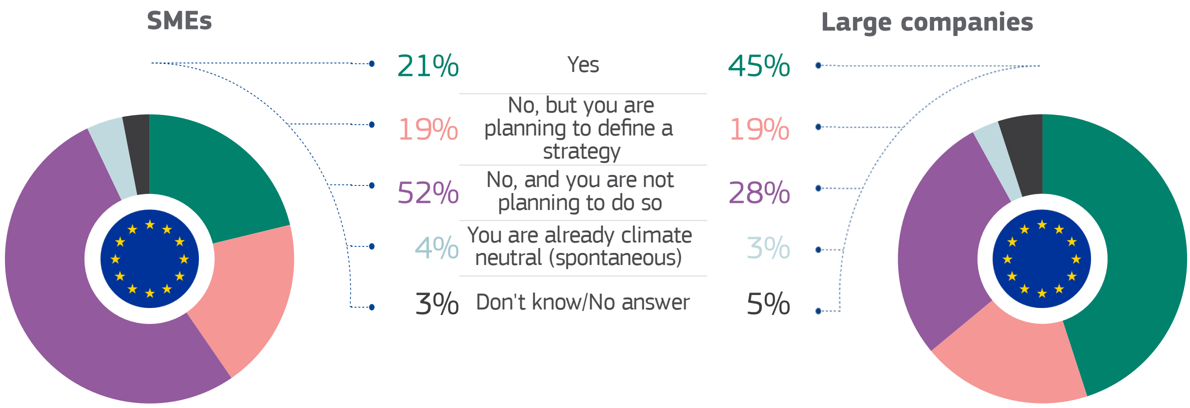
(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

SMEs vs large companies

In line with the results discussed so far in this chapter, respondents in **large companies** are more likely to report that **their company has a carbon reduction strategy in place (45% vs 21% for SMEs).** Moreover, while a slim majority of SMEs (52%) have no plans to define a carbon reduction strategy, this proportion is much lower for large companies (28%). Equal shares of SMEs and large companies (both 19%) reply that they do not have a carbon reduction strategy in place but are planning to define one.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(SMEs vs large companies, EU27)



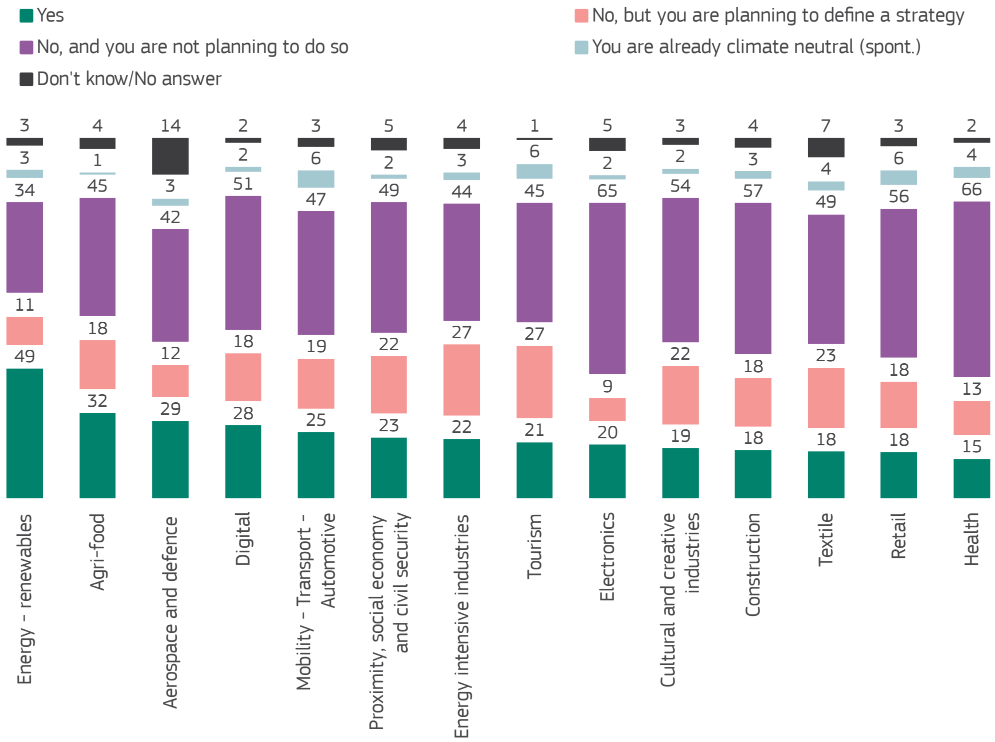
(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by ecosystem

About half (49%) of SMEs in the industrial ecosystem of 'Energy – renewables' reply that they have **a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative. This figure is also high in 'Agri-food' (32%), 'Aerospace and defence' (29%) and 'Digital', but it is much lower in 'Health' (15%). In the ecosystem of 'Health', SMEs are also among the least likely to **plan to define** a carbon reduction strategy (13%) and among the most likely **not to have any plans** to define such a strategy (66%). By comparison, in the ecosystem 'Textile', for example, 18% of SMEs have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative and 23% report that they are planning to define one.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(Ecosystems, SMEs, EU27)



Ecosystem	Yes	No, but planning	No, not planning	Already climate neutral (spont.)	Don't know/No answer
Energy - renewables	49	11	34	3	3
Agri-food	32	18	45	1	4
Aerospace and defence	29	12	42	3	14
Digital	28	18	51	2	2
Mobility - Transport - Automotive	25	19	47	6	3
Proximity, social economy and civil security	23	22	49	2	5
Energy intensive industries	22	27	44	3	4
Tourism	21	27	45	6	1
Electronics	20	9	65	2	5
Cultural and creative industries	19	22	54	2	3
Construction	18	18	57	3	4
Textile	18	23	49	4	7
Retail	18	18	56	6	3
Health	15	13	66	4	2

(%, EU27) Base: n=13 124 (SMEs)

Business demographics

The larger the SME (in terms of **number of employees)**, the more likely it is to have a concrete strategy in place to reduce their carbon footprint and become climate neutral or negative (from 21% among micro companies to 35% for medium-sized companies). Among micro companies, 53% of respondents report that their SME does not have a carbon reduction strategy in place and is also not planning to define one; this figure decreases to 33% for medium-sized companies.

When comparing SMEs looking at their **turnover in 2023**, the largest difference is seen between SMEs with a turnover of €2 000 000-€10 000 000 and those with other turnover values. Among the former, 29% have a carbon reduction strategy in place; among SMEs with other turnover values, between 17% and 24% have a concrete strategy in place.

Nearly a quarter of **high-growth companies** (23%) have a concrete strategy in place to reduce their carbon footprint, while this figure is just 14% for **gazelles**. Among the latter group of SMEs, however, 27% report that there are plans to define a carbon reduction strategy.

SMEs in **manufacturing** are overall the least likely to have a carbon reduction strategy in place (18%), while those in **services** are the most likely to have such a strategy (23%).

Among SMEs **selling both products and services**, 22% reply that they have a concrete strategy in place to reduce their carbon footprint; among SMEs only selling services, this proportion is 18%. SMEs that offer either products or services, or both, have similar intentions to develop a specific strategy for reducing their carbon footprint (between 20% and 21%).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?
(SMEs, EU27)

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral (spont.)	Don't know/No answer
EU27 (SMEs)	21	19	52	4	3
Company size					
Micro (<10 empl.)	21	19	53	4	3
Small (10-49 empl.)	26	20	46	3	4
Medium-sized (50-249 empl.)	35	23	33	4	5
Large (250-499 empl.)	38	20	32	4	7
Large (500+ empl.)	56	17	22	3	2
Company turnover (2023)					
Up to €100 000	17	20	57	3	3
€100 001-€500 000	23	18	53	4	3
€500 001-€2 000 000	19	22	52	4	3
€2 000 001-€10 000 000	29	23	41	3	4
More than €10 000 000	24	27	42	4	2
Company growth					
Gazelles	14	27	55	2	2
High-growth companies	23	18	54	3	3
Weak/no-growth companies	21	20	52	4	4
Negative-growth companies	20	18	54	5	3
Sector of activity (NACE)					
Manufacturing (C)	18	23	51	4	5
Industry (B/D/E/F)	20	18	56	3	4
Retail (G)	20	18	55	5	3
Services (H/I/J/K/L/M)	23	20	50	4	3
Selling products/services					
Products	20	20	51	5	5
Services	21	19	54	3	3
Both	21	20	51	4	3

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by EU Member State

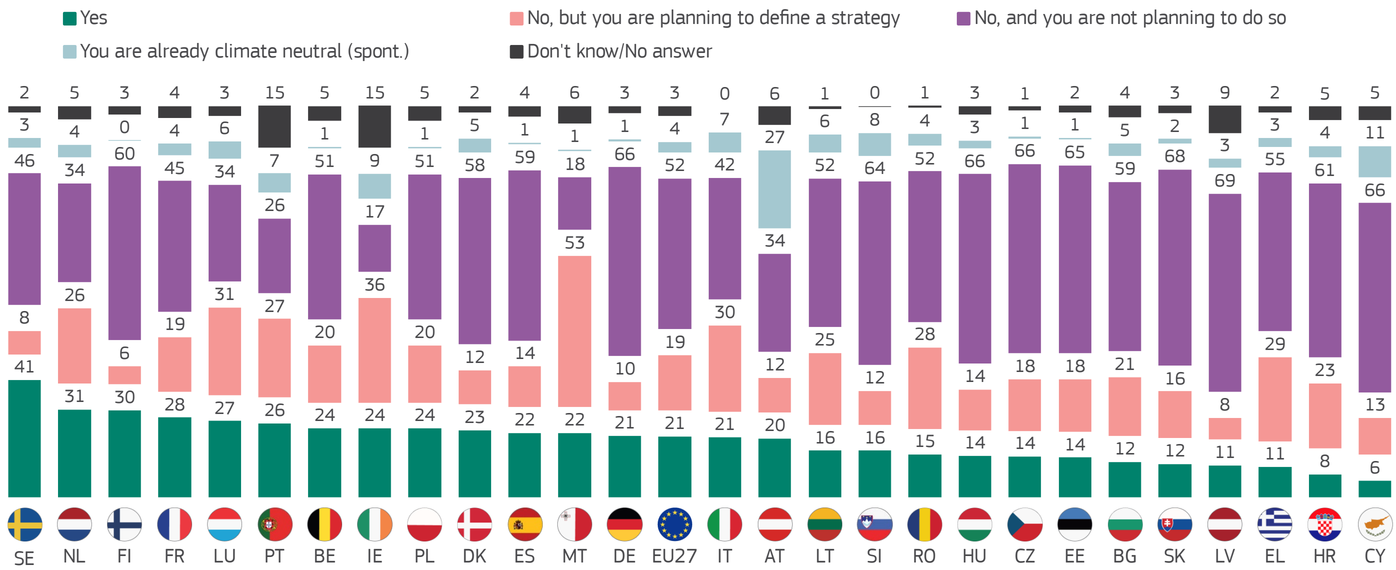
The proportion of SMEs with **a concrete strategy in place to reduce their carbon footprint** and become climate neutral or negative varies between 6% in Cyprus and 41% in Sweden. In half of the EU Member States, at least one in five SMEs report having such a strategy in place. SMEs could also reply that they are **already climate neutral**, but across most this is the case; the most important exception is Austria, where 27% of SMEs surveyed reply that they are already climate neutral.[11]

The proportion of SMEs that do not yet have a carbon reduction strategy in place, but that are **planning to define one** also varies across countries. In Latvia, a country with one of the lowest shares of SMEs having a strategy in place to become carbon neutral, there are also very few SMEs saying they are planning to define such a strategy in the future (8%). In Ireland (36%), Luxembourg (31%) and Italy (30%), on the other hand, at least three in ten SMEs say that they are planning to define a carbon strategy, and in Malta, more than half of SMEs (53%) say so.

The share answering that their SME does not have a concrete strategy in place to reduce their carbon footprint and is also **not planning to define one** is the highest in Latvia (69%), followed by Slovakia (68%), Cyprus (66%), Czechia (66%) and Germany (66%).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

[11] A partial explanation for this outlier figure may be related to policy implemented in Austria. In October 2021, Austria announced tax measures that include a phased-in tax on carbon emissions. Due to this, CO_2 emissions in Austria are being taxed since July 2022.

Non-EU countries

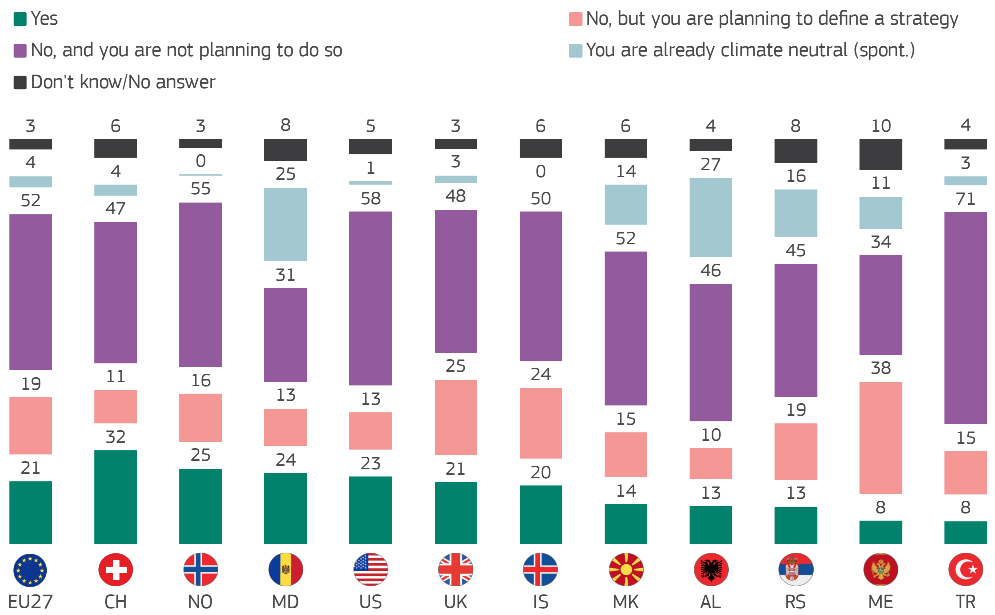
SMEs in the EU (21%) and in **the US** (23%) are about as likely to say that they have a concrete strategy in place to become climate neutral. However, EU SMEs are more likely than their American counterparts to say that they are planning to define such a strategy (19% vs 13%).

About a third of SMEs in **Switzerland** (32%) and a quarter of SMEs in **Norway** (25%) reply that a carbon reduction strategy is in place at their company. In **Montenegro** and **Türkiye**, on the other hand, less than one in ten respondents (both 8%) give this response. That said, nearly four in ten SMEs in Montenegro (38%) are planning to define a strategy, while this figure is just 15% in Türkiye. In Türkiye, 71% of SMEs do not have any plans to define a strategy to become climate neutral.

As noted, before, caution should be exercised interpreting the results for Albania and Moldova, as the sample sizes are relatively low and results for these countries carry a larger margin of error.

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(SMEs, non-EU countries)



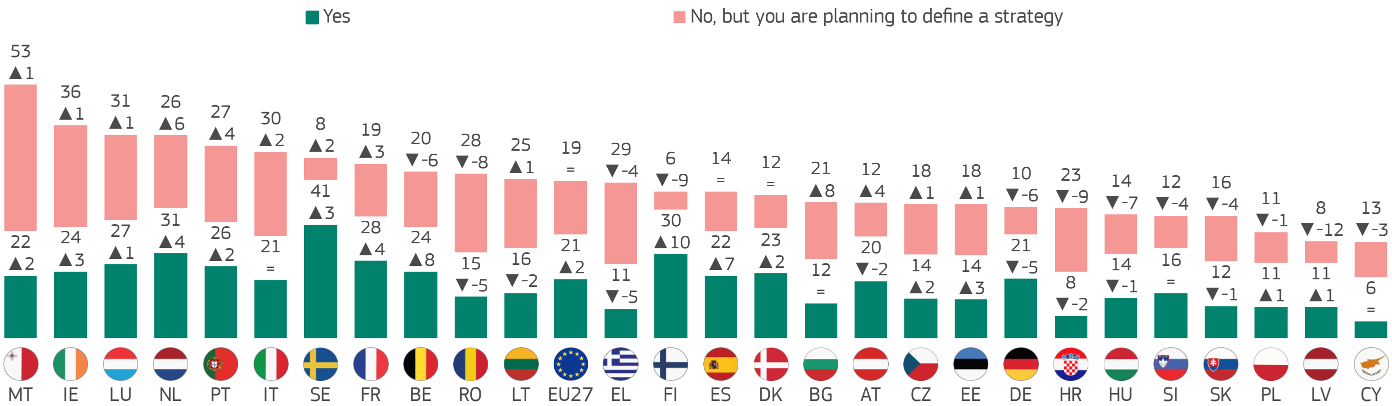
(%, non-EU countries) Base: n=3 783 (SMEs)

Trend compared to 2021

The chart below presents the trend compared to 2021 in the proportion of SMEs that have **a concrete strategy in place to become climate neutral** and the proportion **planning to define such a strategy**. **On average, across the EU, these proportions did not significantly change.** Focusing on individual countries, however, **a few trends are worth pointing out**. In Belgium and Finland, for example, there is a clear increase compared to 2021 in the share of SMEs with a concrete strategy in place to reduce their carbon footprint (+8 pp in Belgium and +10 pp in Finland); in both countries, the share planning to define a strategy has decreased (-6 pp in Belgium and -9 pp in Finland), while the share not have a concrete strategy in place and also not planning to define one has remained stable. In Latvia, on the other hand, as observed in 2021, few SMEs have a strategy in place to become climate neutral (11%, no significant change) and, additionally, the share of SMEs planning to implement such a strategy has more than halved compared to 2021 (to 8%, -12 pp).

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

Measures to become climate neutral

Companies with a concrete strategy in place to reduce their carbon footprint were next asked which **actions they are undertaking to become climate neutral**; they were presented with a list of four actions.

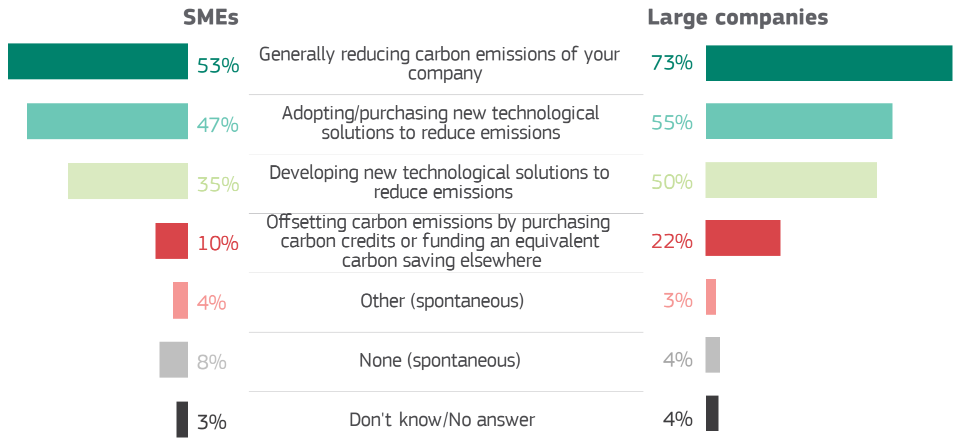
A slim majority of these SMEs (53%) reply that they are **generally reducing carbon emissions** of their company (e.g. by using recycled resources and sustainable suppliers, by switching to online events, by using public transport for business trips etc.). Close to one in two (47%) say they are **adopting or purchasing new technological solutions** to reduce emissions and roughly one in three (35%) are **developing new technological solutions themselves**. Finally, 10% of these SMEs say that they are offsetting carbon emissions, by purchasing carbon credits or funding an equivalent carbon saving elsewhere.

SMEs vs large companies

For each of the climate neutrality actions listed in the survey, **large companies are more likely than SMEs to reply that the action is being taken**. For example, 35% of SMEs with a concrete carbon reduction strategy, say they are developing new technological solutions to achieve carbon neutrality; this figure increases to 50% for large companies.

Due to the smaller base size for this question, results are not discussed in more depth.

Q15 What actions is your company undertaking to be become climate neutral? [MULTIPLE ANSWERS]
(SMEs vs large companies, EU27)



(%, EU27) Base: n=3 083 (SMEs) & n=438 (Large companies) – **Companies with a concrete strategy to reduce their carbon footprint**

2. Barriers to and support for going green

The second chapter of this report looks first at **potential barriers** for SMEs to going green and resource efficient, such as an **increase in production costs** and lack of expertise.

The second part reviews the **types of support** SMEs rely on when taking actions to be more resource efficient, and in particular the types of external support they use. The chapter ends with a discussion of the type of **assistance SMEs consider most effective** in helping them to be more resource efficient.

2.1. Difficulties setting up resource efficiency actions

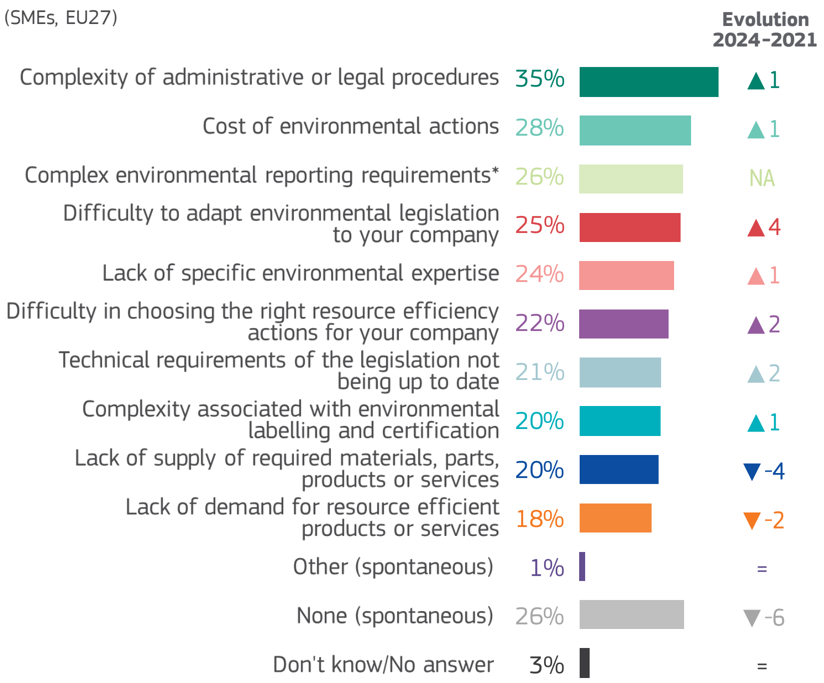
SMEs that are undertaking resource efficiency actions were asked if they encountered any difficulties setting up these actions. They were presented with a list of ten potential difficulties.

More than one in three SMEs undertaking resource efficiency actions (35%) say they encountered **complex administrative or legal procedures setting up these actions** and 26% refer to **complex environmental reporting requirements**. The **cost of environment actions** is mentioned by 28% of SMEs as a barrier encountered trying to set up resource efficiency actions.

For the **remaining difficulties**, between 18% and 25% mention it as a barrier they encountered when setting up resource efficiency actions. For example, 22% of SMEs undertaking resource efficiency actions say it was difficult to choose the right actions for their company and 24% experienced difficulties due to a lack of specific environmental expertise.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)
* Response option not included in 2021

About a quarter of SMEs undertaking resource efficiency actions (26%) reply that they **did not encounter any difficulties** when setting up these actions (see chart on the previous page). The proportion of SMEs that did not experience any difficulties has **decreased compared to 2021** (-6 pp). This decrease, however, is partially attributed to the fact that companies could select an additional item in the current survey, namely ‘complex environmental reporting requirements’ (mentioned by 26% of SMEs).

In the current survey, SMEs are also more likely to report that they were hindered in their resource efficiency efforts by **the difficulty to adapt environmental legislation to their company** (25%, +4 pp). There is a decrease compared to 2021, however, in the share of SMEs saying they faced **a lack of supply of required materials** when setting up resource efficiency actions (20%, -4 pp).

SMEs vs large companies

Some obstacles faced when going green are more frequently mentioned by large companies than by SMEs. For example, 38% of large companies, compared to 28% of SMEs, say that the cost of environmental actions was a barrier trying to set up resource efficiency actions. Moreover, **large companies are less likely to say they did not encounter any of the difficulties listed in the survey** (19% vs 26% of SMEs).

There are, however, also **difficulties that are as frequently mentioned by SMEs and large companies**, such as a lack of specific environmental expertise (both 24%) or a lack of demand for resource efficient products or services (both 18%).

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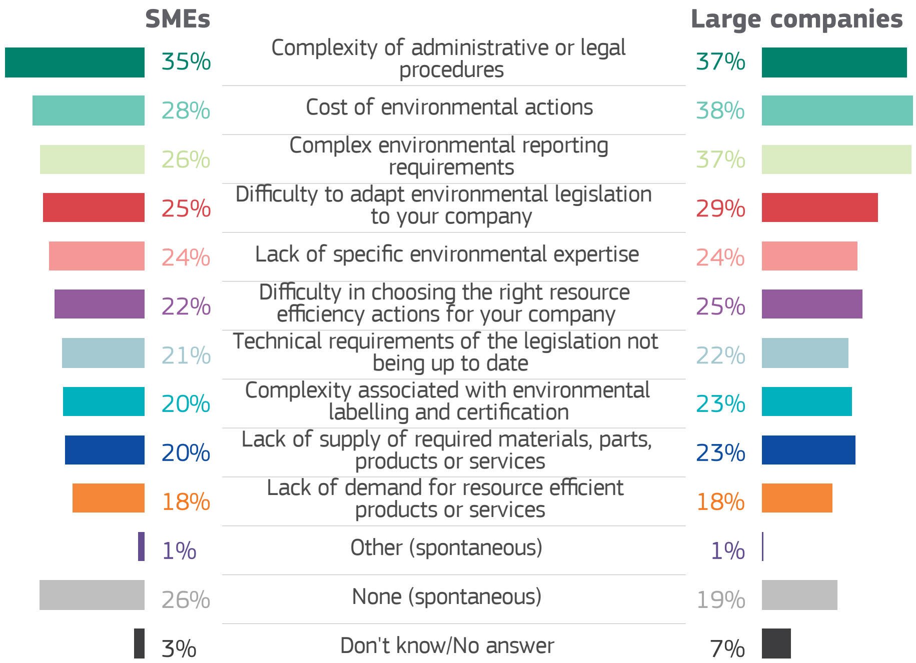
Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

Results by ecosystem

In ten of the industrial ecosystems, the largest share of SMEs undertaking resource efficiency actions refer to **complexity of administrative or legal procedures** – for example, this difficulty is selected by 48% of SMEs in 'Energy – renewables'.

In three industrial ecosystems, respondents are most likely to mention **the cost of environmental actions**; this is the case in 'Electronics' (50%), 'Aerospace and defence' (39%) and 'Textile (33%). Finally, in the industrial ecosystem of 'Health', the largest share of respondents (39%) mention **a lack of demand for resource efficient products or services**.

In 'Digital' (31%) and 'Aerospace and defence' (38%), more than three in ten SMEs reply that they did **not encounter any of the difficulties** listed in the survey. As noted in Section 1.1, SMEs in 'Digital' are the most likely to be undertaking just one or two resource efficiency actions, while in other ecosystems, SMEs are more likely to take three or more actions.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Complexity associated with environmental labelling and certification	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	34	39	27	26	17	24	14	25	12	10	1	38	1
Agri-food	37	34	25	24	35	22	24	20	14	20	0	23	2
Construction	38	28	28	26	24	23	24	22	23	20	2	24	3
Cultural and creative industries	27	24	22	20	23	15	11	24	24	17	0	29	3
Digital	34	30	25	25	20	28	19	15	22	21	0	31	1
Electronics	40	50	29	16	12	36	11	15	20	33	1	14	1
Energy - renewables	48	42	39	36	30	28	24	29	25	19	1	18	4
Energy intensive industries	42	34	28	24	32	14	24	17	17	16	0	21	0
Health	37	33	37	20	22	31	25	31	18	39	2	28	4
Mobility - Transport - Automotive	38	31	28	31	24	25	22	26	22	19	1	26	1
Proximity, social economy and civil security	37	35	24	26	27	32	28	19	22	18	1	22	5
Retail	33	25	25	24	23	18	17	20	20	17	2	28	3
Textile	28	32	18	26	29	17	17	16	21	21	1	22	6
Tourism	35	27	28	27	25	22	27	19	15	17	1	22	4

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking obstacle for each ecosystem is shown in dark red and white font.

(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

Business demographics

Larger SMEs (in terms of number of employees) are more likely to have experienced difficulties when trying to set up resource efficiency actions. Among medium-sized companies undertaking resource efficiency actions, 19% reply that they **did NOT encounter any difficulties** when setting up these actions; this figure increases to 27% for micro companies. Comparing SMEs in terms of their **turnover in 2023**, there is a difference between SMEs with a turnover of €2 000 000-€10 000 000 and those with lower turnover values. Among the former, 22% did not encounter any difficulties when setting up resource efficiency actions; among SMEs with a lower turnover, this proportion not having experience difficulties is higher (between 24% and 28%). The share of companies not having experience difficulties is the highest for SMEs with a turnover of more than €10 000 000 (29%).

High-growth companies (including gazelles) are more likely to have experienced difficulties when trying to set up resource efficiency actions. The share of SMEs that **did NOT encounter any difficulties** varies between 23% of negative-growth companies and 33% for gazelles

SMEs in the **retail and services sectors** (both 28%) are more likely than their counterparts in **manufacturing** (23%) and **industry** (22%) NOT to have experienced difficulties trying to set up resource efficiency actions. Among **SMEs selling both services and products** and undertaking resource efficiency actions, 20% reply that they did NOT encounter any difficulties when setting up these actions; this figure is higher for SMEs that are only selling products (27%) or only selling services (30%).

Across all types of SMEs, **complex administrative or legal procedures** are the **most-mentioned type of difficulty** encountered when setting up resource efficiency actions. For example, this barrier is mentioned by 41% of medium-sized companies (undertaking resource efficiency actions), 42% of negative-growth SMEs, 41% of SMEs in the industry sector and 42% of SMEs that are selling both services and products.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Complexity associated with environmental labelling and certification	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	35	28	26	25	24	22	21	20	20	18	1	26	3
Company size													
Micro (<10 empl.)	35	28	26	25	24	22	20	20	20	18	1	27	3
Small (10-49 empl.)	37	33	30	28	25	24	22	24	22	20	2	23	3
Medium-sized (50-249 empl.)	41	35	34	31	24	24	22	26	22	21	2	19	4
Large (250-499 empl.)	32	33	31	26	25	21	21	19	20	15	1	21	7
Large (500+ empl.)	44	45	48	35	22	32	23	28	29	22	0	15	9
Company turnover (2023)													
Up to €100 000	33	27	25	24	24	20	21	21	21	20	1	28	2
€100 001-€500 000	36	28	27	28	26	25	22	20	19	18	1	26	2
€500 001-€2 000 000	39	31	30	25	23	26	23	21	19	18	2	24	3
€2 000 001-€10 000 000	42	34	33	28	27	27	26	26	25	20	1	22	1
More than €10 000 000	31	20	24	25	23	14	8	18	20	8	2	29	3
Company growth													
Gazelles	34	31	23	23	22	25	20	22	25	20	2	33	1
High-growth companies	39	31	28	30	25	24	24	22	21	23	1	25	1
Weak/no-growth companies	33	26	25	24	23	21	19	20	20	16	2	27	3
Negative-growth companies	42	33	32	30	32	26	24	23	17	26	1	23	3
Sector of activity (NACE)													
Manufacturing (C)	37	32	30	27	27	22	21	21	17	18	1	23	3
Industry (B/D/E/F)	41	31	31	28	25	24	23	22	25	21	2	22	2
Retail (G)	35	28	27	26	24	20	21	22	22	18	1	28	2
Services (H/I/J/K/L/M)	32	26	24	24	23	23	19	19	18	17	1	28	3
Selling products/services													
Products	33	30	27	25	24	21	19	24	19	16	2	27	3
Services	32	25	22	22	23	21	19	17	17	17	1	30	2
Both	42	31	31	30	26	25	24	22	24	21	1	20	2

(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

Results by EU Member State

In four Member States, among SMEs that are undertaking resource efficiency actions, at least four in ten respondent reply that they **did not encounter any difficulties** undertaking these actions; this applies to Estonia (51%), the Netherlands (48%), Latvia (42%) and Lithuania (40%). In Ireland, on the other hand, just 10% of SMEs did not encounter any difficulties in this process.

In 17 Member States, the (joint-)largest share of SMEs say they encountered **complex administrative or legal procedures**, ranging from 20% in Portugal to 53% in Spain. Complex procedures are the least frequently encountered by SMEs undertaking resource efficiency actions in Ireland (9%) and Estonia (11%).

The share of SMEs saying that, setting up resource efficiency actions, they experienced difficulties due to the **cost of environmental actions** ranges from 13% in Malta to 47% in Spain. Other countries at the higher end of the country ranking include Denmark (39%), Greece (37%) and Cyprus (35%); in these countries, the cost of environmental actions is the (joint-)most cited difficulty encountered.

In Spain, 40% of SMEs refer to **complex environmental reporting requirements**. Spain is followed by Czechia (34%), Lithuania (34%) and Germany (33%). In the latter two of these countries, complex environmental reporting requirements are the top-ranking difficulties faced by SMEs going green. In sharp contrast, in Luxembourg, this obstacle in mentioned by just 5% of SMEs.

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Complexity associated with environmental labelling and certification	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	35	28	26	25	24	22	21	20	20	18	1	26	3
BE	41	28	27	30	24	27	29	25	22	22	0	29	1
BG	41	26	22	17	26	18	28	17	18	24	3	22	3
CZ	49	26	34	19	20	19	21	18	22	22	0	24	1
DK	24	39	26	13	20	23	9	24	16	21	4	28	6
DE	32	31	33	23	22	18	16	30	23	18	4	28	3
EE	11	14	12	10	10	10	9	11	11	15	0	51	3
IE	9	25	15	4	10	16	1	6	22	12	2	10	5
EL	37	37	29	17	25	25	22	29	23	22	0	33	0
ES	53	47	40	40	46	34	38	27	32	30	0	18	3
FR	39	36	29	38	28	34	32	23	21	22	0	14	4
HR	34	15	15	13	16	11	22	11	11	10	2	32	6
IT	28	17	22	18	15	15	16	15	10	9	2	34	1
CY	33	35	23	19	20	21	12	24	17	12	0	39	1
LV	26	23	18	12	19	12	17	7	14	14	1	42	2
LT	32	24	34	30	31	26	17	23	19	14	1	40	0
LU	30	22	5	21	16	19	19	14	29	17	2	20	9
HU	32	23	18	21	10	11	20	10	11	6	2	38	5
MT	17	13	10	11	15	8	20	6	19	12	8	37	3
NL	13	18	12	12	20	16	6	17	15	6	0	48	1
AT	35	30	11	17	27	18	9	15	18	27	2	18	3
PL	45	23	24	35	30	22	13	20	22	23	2	16	2
PT	20	14	14	14	9	16	12	10	18	11	4	21	9
RO	34	21	23	29	20	21	25	20	21	25	0	26	2
SI	30	25	17	14	19	11	6	14	13	7	8	36	0
SK	44	27	29	23	14	16	22	18	18	18	1	30	3
FI	21	26	20	19	15	24	15	22	21	11	0	34	2
SE	20	29	26	15	15	26	14	18	19	19	0	34	4

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking obstacle for each country is shown in dark red and white font.

(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

Non-EU countries

SMEs undertaking resource efficiency actions in **the US** are less likely than their counterparts in the EU to have encountered difficulties due to complex administrative or legal procedures (17% vs. 35%), but they more frequently refer to a lack of supply of required materials, parts, products or services (29% vs 20%).

In line with the EU average results, in most non-EU countries, complexity of administrative or legal procedures is mentioned by the largest share of SMEs, such as 32% in **Moldova** and 35% in **Türkiye**. SMEs in Türkiye (35%), together with those in **Norway** (47%) and **Switzerland** (33%), are also likely to say that the cost of environmental actions is a difficulty when trying to set up resource efficiency actions.

In six of the non-EU countries surveyed, including the US, among SMEs that are undertaking resource efficiency actions, more than 30% reply that they **did not encounter any difficulties** when setting up these actions (between 31% in the UK and Iceland and 50% in Albania).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Complexity associated with environmental labelling and certification	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	35	28	26	25	24	22	21	20	20	18	1	26	3
UK	15	26	15	13	17	14	14	16	27	27	0	31	1
IS	23	21	24	13	17	16	16	25	19	18	0	31	13
NO	32	47	33	24	29	35	16	27	18	27	1	22	3
CH	22	33	17	22	17	19	10	17	21	19	1	28	6
ME	28	4	11	13	4	7	12	18	7	5	0	40	3
MD	32	16	7	23	15	19	23	18	10	15	12	26	10
MK	21	12	13	15	10	9	10	6	8	12	9	37	5
AL	22	1	1	15	6	1	1	1	7	1	0	50	9
RS	42	22	19	19	21	19	20	10	18	14	1	26	5
TR	35	35	26	28	31	30	27	30	34	33	0	30	2
US	17	24	15	17	18	21	15	16	29	25	0	40	4

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking obstacle for each country is shown in dark red and white font.

(%, non-EU countries) Base: n=3 299 (SMEs) - **Companies undertaking resource efficiency actions**

Trend compared to 2021

The table on the next page shows the **evolution since 2021**, **at a country-by-country basis**, looking at each of the difficulties SMEs may have encountered when trying to set up resource efficiency actions.[12] Green values indicate a positive trend – i.e. a decrease in the proportion of SMEs that encountered difficulties (or an increase in the proportion of SMEs that have not experienced any difficulties – last column in the table). Red values indicate a negative trend – i.e. an increase in the proportion of SMEs that encountered difficulties (or a decrease in the proportion of SMEs that have not experienced any difficulties).

The first observation to be made is that, compared to 2021, the proportion of SMEs undertaking resource efficiency actions and that did **NOT encounter any difficulties** setting up these actions has decreased by six percentage points, on average, across the EU.[13] At the individual country level, the largest decreases in this proportion are observed in France (-19 pp), Austria (-18 pp), Denmark (-15 pp), Bulgaria (-14 pp), Italy (-11 pp) and Germany (-10 pp).

The second observation to be made is the change observed for **a lack of supply of required materials, parts, products or services.** This obstacle is now mentioned by fewer SMEs (-4 pp, on average, across the EU). At the individual country level, the largest decreases are observed in Latvia (-16 pp), Hungary (-13 pp), Slovakia (-12 pp), (-12 pp), Croatia (-11 pp), Estonia (-11 pp) and Romania (-9 pp).

[12] The answer ‘complex environmental reporting requirements’ has been included for the first time in the current survey.

[13] As noted earlier, this decrease may be partially attributed to the fact that SMEs could select an additional item, namely ‘complex environmental reporting requirements’ (mentioned by 26% of SMEs).

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Complexity of administrative or legal procedures	Cost of environmental actions	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Complexity associated with environmental labelling and certification	Lack of supply of required materials, parts, products or services	Lack of demand for resource efficient products or services	None (spontaneous)
EU27	▲1	▲1	▲4	▲1	▲2	▲2	▲1	▼-4	▼-2	▼-3
BE	▲5	▲8	▲9	▲5	▲4	▲4	▲5	▼-6	=	=
BG	▲14	▲16	▲7	▲15	▲9	▲11	▲10	▲7	▲17	▼-13
CZ	▲2	▲1	▲3	▼-4	▲1	▼-1	=	▼-8	▼-1	▼-5
DK	▲15	▲24	▲4	▲11	▲11	▲1	▲12	▼-1	▲13	▼-9
DE	▲3	▲9	▲7	▲3	▲2	▼-1	▲4	▼-7	▼-1	▼-5
EE	▼-6	▼-4	▼-3	▼-4	▼-3	▼-3	▼-6	▼-10	▼-7	▼-6
IE	=	▲3	▼-2	▲2	▲3	▼-4	▼-2	▲1	▲3	▼-6
EL	▼-3	=	=	▼-5	▲2	▼-3	▲1	▼-6	▼-1	=
ES	=	▲2	▲9	▼-1	▲1	▲9	▼-2	▼-7	▼-8	▼-3
FR	▲15	▲13	▲22	▲13	▲15	▲18	▲9	▼-2	▲7	▼-6
HR	▼-7	▼-2	▼-8	▼-2	▼-3	▼-6	=	▼-10	▼-13	▲3
IT	▼-4	▼-7	▼-2	▼-2	▼-1	▲1	▲1	▲1	▼-3	▼-2
CY	▼-1	▼-5	▲7	▼-2	▲1	▼-3	▲5	▼-10	▼-6	▼-3
LV	▼-6	▼-4	▼-6	▼-6	▼-12	▼-6	▼-10	▼-16	▼-8	▲15
LT	▲4	▲10	▲20	▲11	▲7	▲6	▲11	▼-8	▼-6	=
LU	▼-1	▼-5	▼-4	▼-1	▼-4	▼-2	▼-5	▲7	▼-3	▼-3
HU	▼-1	▼-3	▼-1	▼-5	▼-13	▲6	▼-1	▼-13	▼-11	▲10
MT	▼-3	=	▲2	▲1	▼-3	▲3	▼-2	▼-3	=	▼-4
NL	▼-1	▼-2	=	▲2	▲2	▼-6	=	▼-2	▼-4	▼-4
AT	=	▲1	▼-4	▲6	=	▼-7	=	▲1	▲7	▼-3
PL	▲2	▼-4	▼-5	▲4	▼-4	▼-6	▼-5	▼-1	▼-2	▼-11
PT	=	▼-3	▼-3	▼-1	▲3	▲2	▲1	▲2	▲2	▼-2
RO	▼-13	▼-10	▼-7	▼-14	▼-7	▼-8	▼-7	▼-9	▼-7	▲3
SI	▲11	▲1	▲2	▲5	▼-1	▼-7	=	▼-7	▼-9	▲6
SK	▼-8	▼-3	▼-1	▼-8	▼-2	▲1	▼-7	▼-12	▼-7	▲1
FI	▼-1	▲3	▲1	▲1	▲2	▼-5	▼-1	▲3	▼-7	▼-3
SE	▼-9	▼-6	▼-6	▼-7	▼-7	▼-5	▼-4	▼-12	▼-6	▲3

Note: (1) green cells indicate a positive trend (ie. a decrease in the proportion of SMEs that encountered a difficulties or an increase in the proportion of SMEs that have not experienced any difficulties); red cells represent a negative trend. (2) Obstacle 'Complex environmental reporting requirements' is not included as this response was not included in 2021.

(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

2.2. Impact of resource efficiency actions on production costs

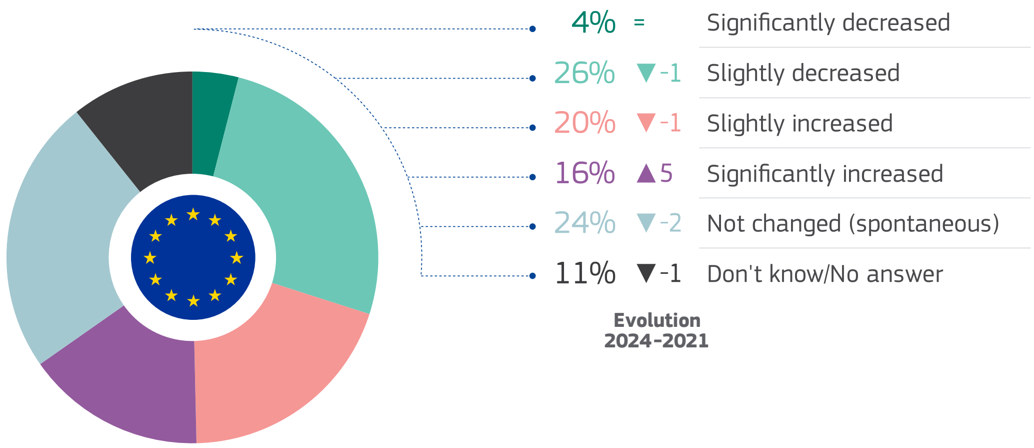
The previous section looked at difficulties experienced by SMEs when setting up resource efficiency actions. This section looks at the results for the question on **changes in production costs due to the resource efficiency actions undertaken in the SMEs**. How production costs are impacted can be a barrier or incentive to resource efficiency. If production costs increase, SMEs may be less likely to implement additional resource efficiency measures; however, if it can be demonstrated that resource efficiency measures increase efficiency in terms of reducing production costs and increasing profitability, this can be an important incentive to invest in resource efficiency measures.

Among SMEs taking resource efficiency actions, **4% say these actions have significantly decreased their production costs over the past two years and 26% that there was a slight decrease** in production costs. **One in five SMEs (20%) say production costs have slightly increased and 16% that this increase has been significant.** About a quarter (24%) say there has been no change in production costs as a result of the resource efficiency actions.

Compared to 2021, there is **an increase** in the proportion of SMEs saying that **production costs have significantly increased** as a result of the resource efficiency actions (+5 pp).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, EU27)



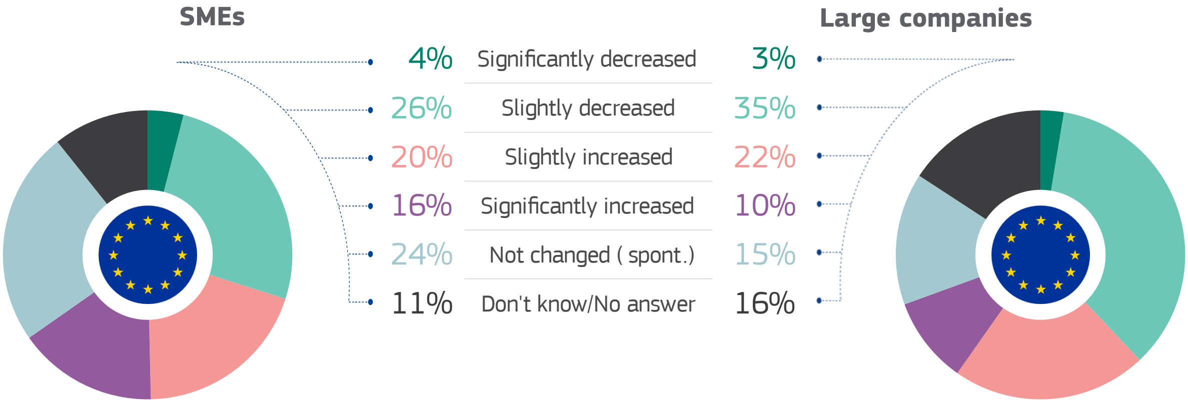
(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

SMEs vs large companies

Among SMEs and large companies, around three in ten companies taking resource efficiency actions reply that these actions have increased their production costs over the past two years. Nonetheless, **among large companies, there are somewhat more respondents saying that the actions have led to a ('significant' or 'slight') decrease in production costs** (38% vs 30% for SMEs) and less respondents saying there was no change (15% vs 24%, respectively).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs vs large companies)



(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

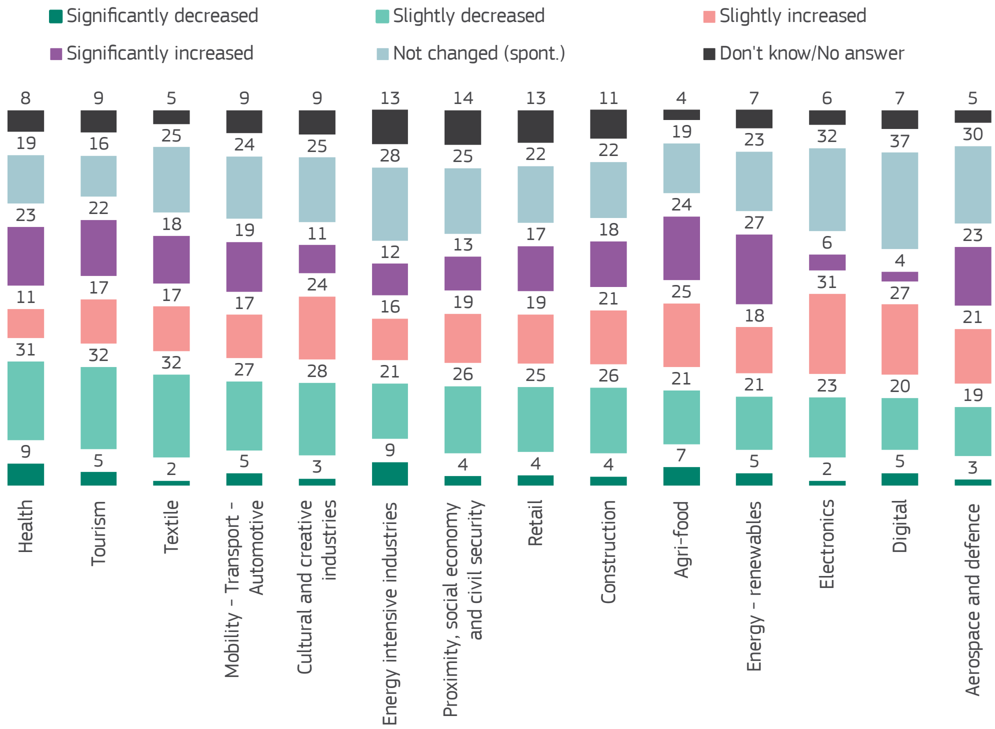
Results by ecosystem

The proportion of SMEs saying that the resource efficiency actions they have undertaken have led to **a decrease in production costs** over the past two years varies between 22% in 'Aerospace and Defence' and 39% in 'Health'.[14] The share of SMEs stating the opposite – that the **resource efficiency actions undertaken have increased production costs** – is overall the highest in 'Agri-food' (49%) followed by 'Energy – renewables (44%).

SMEs in 'Digital' (37%) are more likely than their counterparts in other ecosystems (between 16% and 32%) to answer that the resource efficiency actions undertaken **did not lead to a change in production costs**.

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(Ecosystems, SMEs, EU)



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

[14] Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

Business demographics

Micro and small companies are the least likely to say that the resource efficiency actions undertaken in their company have decreased production costs (both 30%); this figure increases to 36% for **medium-sized companies**. The share of SMEs having seen a decrease in production costs, however, does not vary significantly looking at **SMEs' turnover values**. The share of SMEs stating the opposite – that the resource efficiency actions undertaken have increased production costs – is higher for SMEs with an annual turnover of between €2 000 001-€10 000 000 (41% vs 30%-37% for SMEs in the other turnover categories).

There are also important differences in the share of SMEs having seen an increase in production costs in terms of **company growth**. Among negative-growth SMEs, 43% of respondents report that the resource efficiency actions undertaken have led to an increase in production costs; this figure decreases to 25% for gazelles.

The **sector analysis** shows that SMEs in industry (41%) and manufacturing (39%) are more likely to say that production costs have increased due to the resource efficiency measures taken in the past two year; this figure is 36% for SMEs in retail and 32% for SMEs in the services sector. In line with this, **SMEs selling only services** (32%) are less likely than SMEs selling products (37%) or selling both products and services (39%) to have seen their production costs increase.

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, EU27)

	Significantly decreased	Slightly decreased	Slightly increased	Significantly increased	Not changed (spontaneous)	Don't know/No answer
EU27 (SMEs)	4	26	20	16	24	11
Company size						
Micro (<10 empl.)	4	26	20	16	24	11
Small (10-49 empl.)	3	27	22	16	21	10
Medium-sized (50-249 empl.)	4	32	22	14	17	12
Large (250-499 empl.)	3	37	21	9	16	14
Large (500+ empl.)	3	34	23	10	12	18
Company turnover (2023)						
Up to €100 000	4	28	20	13	23	12
€100 001-€500 000	4	25	20	16	26	8
€500 001-€2 000 000	3	29	18	15	25	10
€2 000 001-€10 000 000	4	29	23	19	18	8
More than €10 000 000	3	25	22	8	21	21
Company growth						
Gazelles	6	31	17	8	27	11
High-growth companies	5	26	21	17	23	8
Weak/no-growth companies	3	26	20	15	25	12
Negative-growth companies	7	20	20	23	21	8
Sector of activity (NACE)						
Manufacturing (C)	4	28	19	20	23	5
Industry (B/D/E/F)	3	23	22	19	21	11
Retail (G)	4	27	20	17	22	11
Services (H/I/J/K/L/M)	4	26	19	13	26	12
Selling products/services						
Products	5	24	18	19	23	10
Services	4	28	20	12	26	11
Both	4	25	21	19	21	11

(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

Results by EU Member State

There is a **large variation across countries** in the proportion of SMEs that have seen **their production costs either increase or decrease due to the resource efficiency actions** undertaken. In Cyprus, one in two SMEs (50%) say that the resource efficiency actions they have undertaken have led to a decrease in production costs over the past two years. In Germany and France, on the other hand, an almost equal proportion (48%-49%) state the opposite – that the resource efficiency actions undertaken have increased production costs.[15]

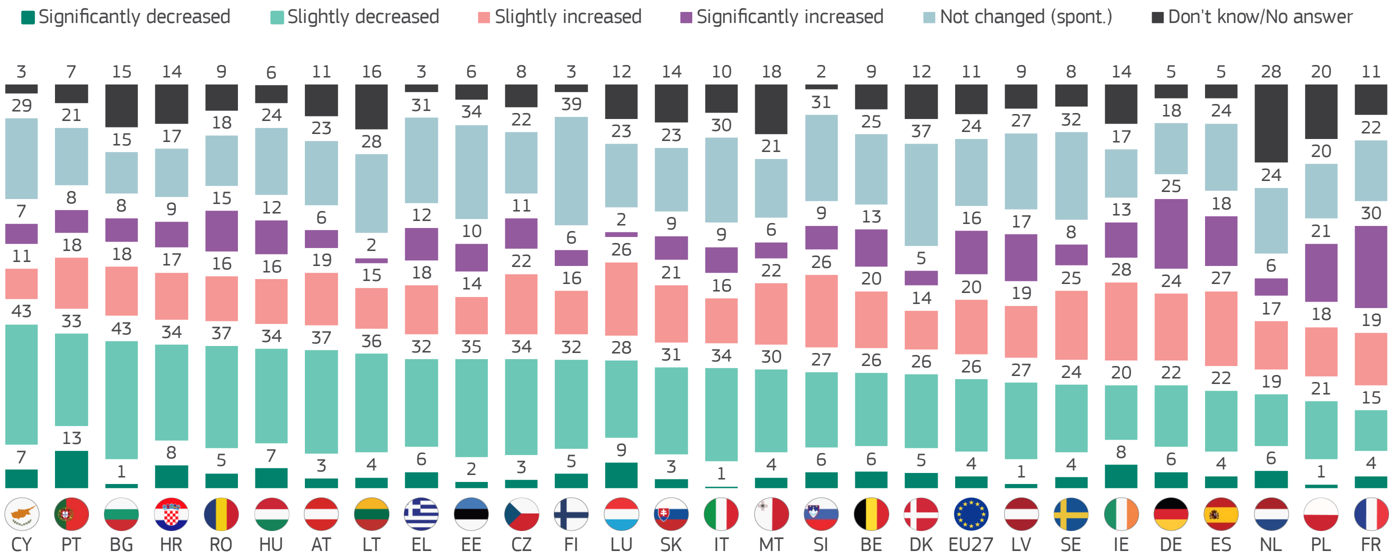
Countries close to Cyprus – with a high proportion of SMEs having seen production costs decrease after undertaking resource efficiency actions – are Portugal (47% 'decreased' responses) and Bulgaria (44%).

Spain joins Germany and Poland, with 45% of SMEs answering that resource efficiency actions undertaken in the past two years have increased production costs.

The share of SMEs replying that the resource efficiency actions undertaken **did not lead to a change in production costs** varies between 15% in Bulgaria and 39% in Finland.

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, EU27)



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

[15] Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

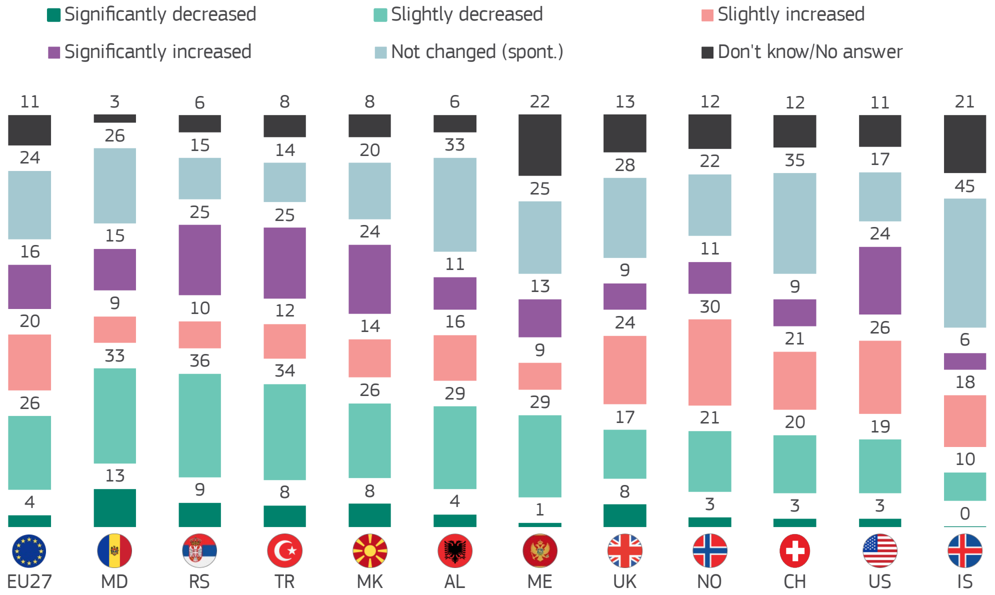
Non-EU countries

The proportion of SMEs saying that the resource efficiency actions they have undertaken have led to a decrease in production costs over the past two years varies between 10% in **Iceland** and 45% in **Serbia** (and 47% in Moldova).[16]

Conversely, the proportion having seen an increase in production costs ranges from 23% in **Montenegro** to 50% in the US. SMEs in **the US,** in other words, are much more likely than SMEs in the EU to report that resource efficiency actions have increased their production costs (50% vs. 35%).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, non-EU countries)



	EU27	MD	RS	TR	MK	AL	ME	UK	NO	CH	US	IS
Don't know/No answer	11	3	6	8	8	6	22	13	12	12	11	21
Not changed (spont.)	24	26	15	14	20	33	25	28	22	35	17	45
Significantly increased	16	15	25	25	24	11	13	9	11	9	24	6
Slightly increased	20	9	10	12	14	16	9	24	30	21	26	18
Slightly decreased	26	33	36	34	26	29	29	17	21	20	19	10
Significantly decreased	4	13	9	8	8	4	1	8	3	3	3	0

(%, non-EU countries) Base: n=3 299 (SMEs) – **Companies undertaking resource efficiency actions**

[16] Caution should be exercised when interpreting the results of Moldova, due to the smaller number of interviews.

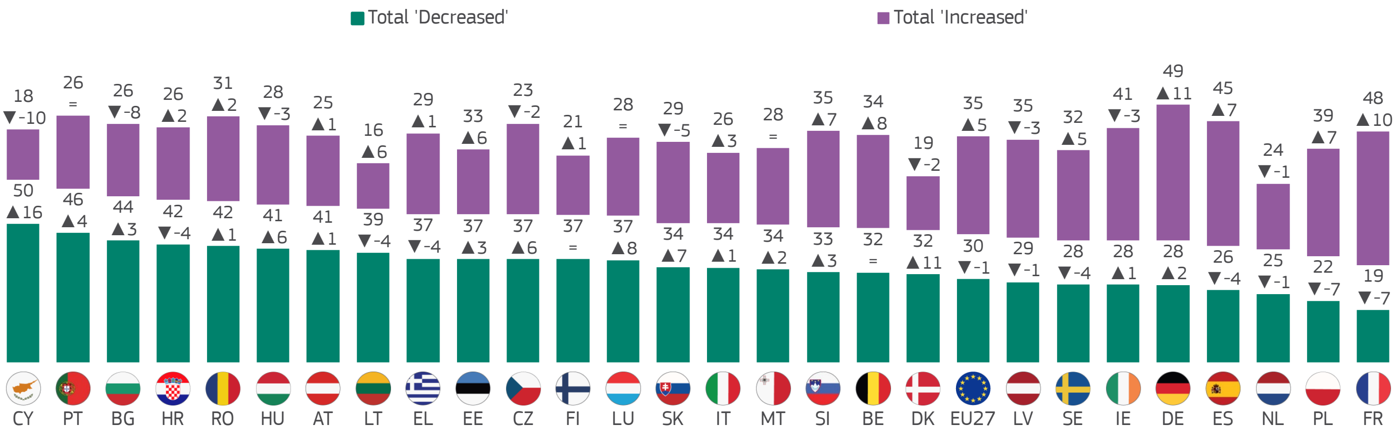
Trend compared to 2021

Compared to 2021, on average, across the EU, there is **an increase** in the proportion of SMEs saying that **production costs have increased** as a result of the resource efficiency actions. The change in the average results, however, is mainly driven by the increase in this proportion observed in Germany (+11 pp, to 49%).

A large (significant) increase in the share of SMEs saying that **production costs have decreased** as a result of the resource efficiency actions undertaken is seen in Cyprus (+16 pp, to 50%) and Denmark (+11 pp, to 32%).

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, EU27)



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

Impact on resource efficiency by type of resource efficiency action taken

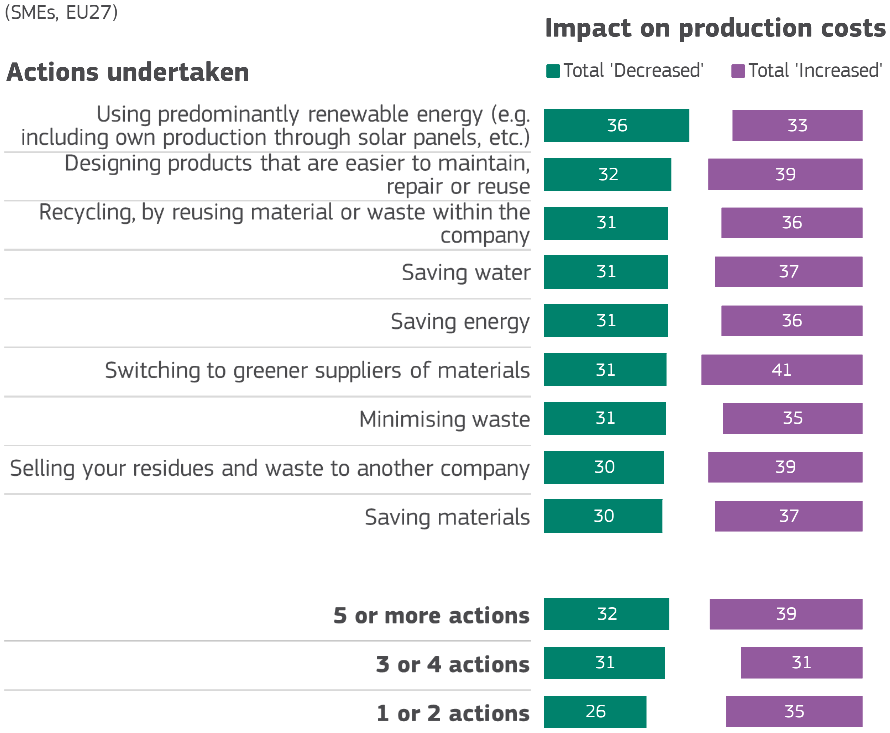
In Section 1.1, it was noted that most EU SMEs are taking more than one type of action to increase their resource efficiency. The chart below tries to shed light on differences in impact on production costs by type of resource efficiency action taken. Note that some caution is needed to interpret the differences across the types of resource efficiency actions, due to the fact that SMEs tend to take multiple actions.

That said, the results appear to show that **SMEs reporting to use predominantly renewable energy are more likely to answer that production costs have decreased** as a result of the resource efficiency actions undertaken, compared to, for example, SMEs that report saving materials (36% vs 30%).

The largest share of SMEs saying that **production costs have increased** is seen for those SMEs that have switched to greener suppliers of materials (41%) and those that design products that are easier to maintain and reuse (39%).

Q1 What actions is your company undertaking to be more resource efficient?
Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(SMEs, EU27)



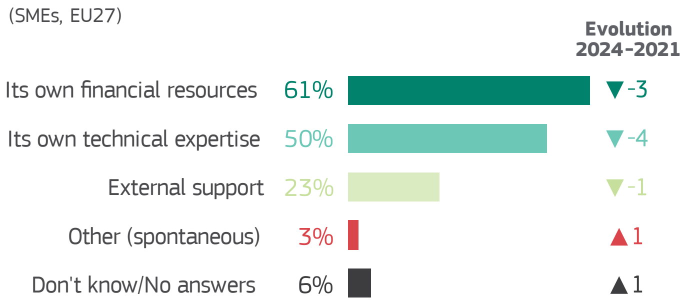
(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

2.3. Support to go green and resource efficient

Among SMEs that have taken resource efficiency actions, **61% rely on their own financial resources** and **50% on their own technical expertise** in their efforts to be more resource efficient. **Comparatively less SMEs (23%) rely on external support.**

Compared to 2021, the proportion of SMEs relying on their own financial resources has decreased (-3 pp); the same trend is seen for the proportion of SMEs relying on their own technical support (-4 pp). There is no significant change in the average share of SMEs relaying on external support.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]



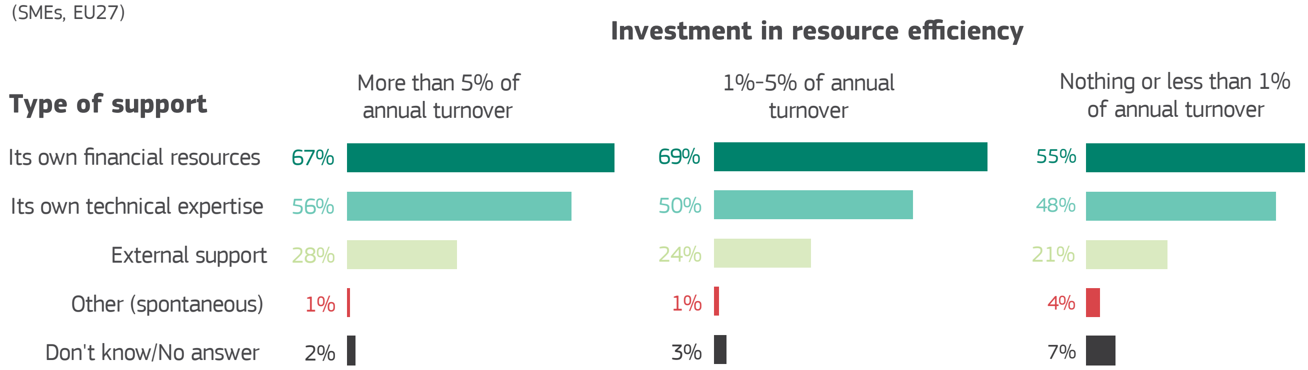
(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

SMEs having **invested, on average, at least 1% of their annual turnover over the past two years** to become more resource efficient are more likely than SMEs undertaking resource efficiency actions without making this level of investment to rely on their own financial resources, on their own technical expertise and on external support for their resource efficiency actions. For example, 21% of the latter type of SMEs (i.e. those not investing) say they rely on external support to become more resource efficient; this figure increases to 24% for SMEs having invested between 1% and 5% of their annual turnover and to 28% for those having invested more than 5%.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(SMEs, EU27)



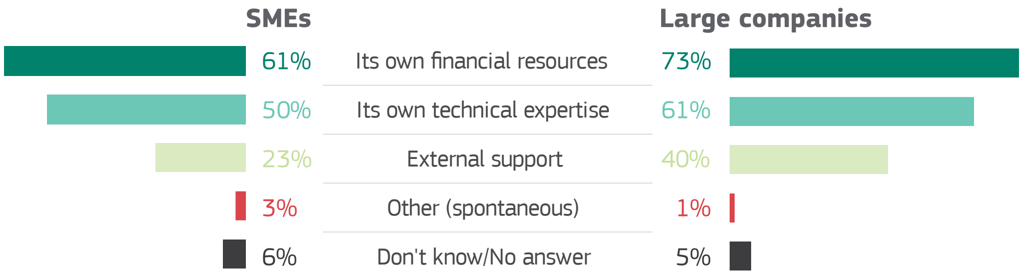
(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

SMEs vs large companies

Compared to SMEs, **large companies are more likely to rely on their own financial resources** (73% vs 61%) and their **own technical expertise** (61% vs 50%) in their efforts to be more resource efficient. The biggest difference between SMEs and large companies, however, is observed for **external support**: 40% of large companies, compared to 23% of SMEs, say they rely on external support in their efforts to be more resource efficient.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

Results by ecosystem

Across most ecosystems, the largest share of say they rely on their **own financial resources** in their efforts to be more resource efficient (e.g. 62% in 'Proximity, social economy and civil security' and 69% in 'Mobility - Transport – Automotive').

SMEs in 'Energy – renewables' stand out with 74% saying that they rely on their **own technical expertise** in their efforts to be more resource efficient.

The share of SMEs reporting to use **external support** to become more resource efficient remains below a third in most ecosystems and varies between 12% in 'Digital' and 36% in 'Agri-food'.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/ No answer
Aerospace and defence	59	66	29	0	2
Agri-food	55	50	36	3	3
Construction	62	55	20	3	4
Cultural and creative industries	61	48	21	2	7
Digital	65	56	12	3	4
Electronics	60	54	24	0	2
Energy - renewables	58	74	28	1	7
Energy intensive industries	67	60	21	7	3
Health	65	35	15	1	19
Mobility - Transport - Automotive	69	48	22	3	6
Proximity, social economy and civil security	62	42	23	1	7
Retail	58	49	23	3	7
Textile	58	58	18	0	9
Tourism	59	44	31	2	4

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each ecosystem is shown in dark green and white font.

(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

Business demographics

The larger the SME (in terms of **employees**), the more likely they are to rely on the three types of support to become more resource efficient. The difference is again the largest for external support: 22% of micro companies rely on external support, compared to 30% of small companies and 38% of medium-sized ones. The importance of external support also increases with **annual turnover** of the SME: from 17% for SMEs with a turnover of €100 000 or less to 28%-30% for SMEs with a turnover of more than €2 000 000.

There also appears to be a slightly higher tendency among high-growth SMEs (excl. gazelles) to rely on external support in their attempts to go green (25%, compared to e.g. 21% of negative-growth SMEs).

In their efforts to be more resource efficient, SMEs in **industry** (56%) and **manufacturing** (53%) are more likely to rely on their own technical expertise than SMEs in services (49%) and retail (46%). Comparing SMEs **selling services vs products**, only one significant difference is observed – SMEs focusing on both products and services are somewhat more likely to rely on their own technical expertise (54% vs 47%-49% for SMEs selling only products or services).

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27 (SMEs)	61	50	23	3	6
Company size					
Micro (<10 empl.)	60	50	22	3	6
Small (10-49 empl.)	66	53	30	2	5
Medium-sized (50-249 empl.)	68	57	38	2	2
Large (250-499 empl.)	69	57	35	2	4
Large (500+ empl.)	78	68	47	0	7
Company turnover (2023)					
Up to €100 000	68	50	17	3	5
€100 001-€500 000	57	48	21	3	8
€500 001-€2 000 000	57	49	27	2	5
€2 000 001-€10 000 000	62	54	30	1	3
More than €10 000 000	56	57	28	2	2
Company growth					
Gazelles	66	55	19	4	3
High-growth companies	63	49	25	2	4
Weak/no-growth companies	60	51	23	3	6
Negative-growth companies	63	45	21	3	8
Sector of activity (NACE)					
Manufacturing (C)	62	53	25	1	4
Industry (B/D/E/F)	60	56	21	3	5
Retail (G)	61	46	21	3	7
Services (H/I/J/K/L/M)	61	49	24	2	5
Selling products/services					
Products	63	47	24	2	6
Services	60	49	22	3	5
Both	60	54	23	2	6

(%, EU27) Base: n=12 184 (SMEs) & n=894 (Large companies) – **Companies undertaking resource efficiency actions**

Results by EU Member State

In 25 Member States, the largest share of SMEs to say they rely on their **own financial resources** in their efforts to be more resource efficient. The proportion selecting this response is overall the highest in Romania (86%), followed by Austria (80%) and Estonia, Greece and Slovakia (all 78%). In France, on the other hand, less than half of SMEs (42%) rely on their own financial resources.

In Poland (61%) and Italy (59%), the largest share of SMEs say they rely on their **own technical expertise** to become more resource efficient. In the other Member States, the proportion selecting this response varies between 28% in Ireland and 67% in Czechia.

The highest shares of SMEs relying on **external support** in their efforts to be more resource efficient are observed in Hungary and Malta (both 33%), followed by Austria and France (both 30%), while the lowest ones are seen in Estonia (5%) and in Latvia and Poland (both 6%).

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]
(SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	61	50	23	3	6
BE	71	43	26	3	16
BG	69	53	14	4	3
CZ	77	67	18	1	4
DK	55	48	24	5	7
DE	68	59	27	5	6
EE	78	61	5	1	5
IE	60	28	26	0	8
EL	78	44	16	2	2
ES	59	44	26	5	9
FR	42	33	30	4	9
HR	66	38	12	3	7
IT	50	59	26	0	2
CY	69	41	15	4	4
LV	58	50	6	1	9
LT	74	50	15	3	7
LU	66	35	24	2	5
HU	64	41	33	4	7
MT	70	49	33	2	5
NL	64	42	29	1	4
AT	80	63	30	0	0
PL	60	61	6	0	4
PT	56	42	12	4	8
RO	86	40	8	1	1
SI	73	62	20	3	3
SK	78	61	22	1	6
FI	61	55	22	1	2
SE	66	57	15	3	8

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.
(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

Non-EU countries

A similar picture emerges in the non-EU countries, with the largest share of SMEs relying on their own financial resources in their efforts to be more resource efficient (between 49% in **Iceland** and 74% in **Moldova**). The share of SMEs relying on their own technical expertise is the highest in **the UK** (59%) and the lowest in **Albania** (12%).

There is also a large variation across the non-EU countries in the proportion of SMEs having taken resource efficiency actions and relying on **external support in their efforts**. This proportion ranges from 10% in **Moldova** and **Iceland** to about four in ten SMEs in **Norway** (39%) and **Switzerland** (41%). In **the US**, 31% of SMEs use external support in their efforts to be more resource efficient (compared to 23%, on average, across the EU).

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	61	50	23	3	6
UK	61	59	26	0	8
IS	49	37	10	1	27
NO	59	46	39	2	6
CH	63	45	41	2	7
ME	54	45	16	0	11
MD	74	30	10	10	2
MK	68	23	13	4	6
AL	68	12	22	0	2
RS	66	35	29	2	3
TR	57	35	21	1	10
US	62	49	31	2	12

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, non-EU countries) Base: n=3 299 (SMEs) - **Companies undertaking resource efficiency actions**

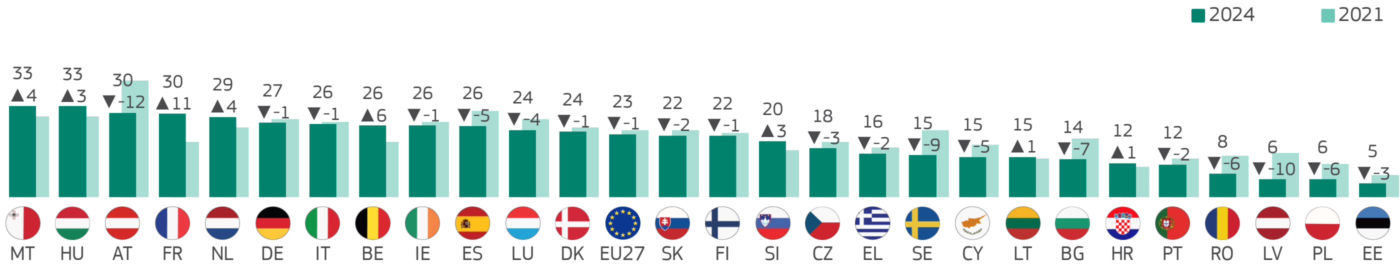
Trend compared to 2021

The chart below shows the trend **compared to 2021** for the proportion of SMEs having taken resource efficiency actions and relying on **external support in their efforts**. The proportion of SMEs relying on external support to be more resource efficient has decreased by more than five percentage points compared to 2021 in Austria (-12 pp, to 30%), Latvia (-10 pp, to 6%), Sweden (-9 pp, to 15%), Bulgaria (-7 pp, to 14%), Romania (-6 pp, to 8%) and Poland (-6 pp, to 6%) The opposite trend is seen in France (+11 pp, to 30%) and Belgium (+6 pp, to 26%), where there are now more SMEs reporting to rely on external support.

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)

% External support



(%, EU27) Base: n=12 184 (SMEs) – **Companies undertaking resource efficiency actions**

▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

Types of external support used by SMEs to be more resource efficient

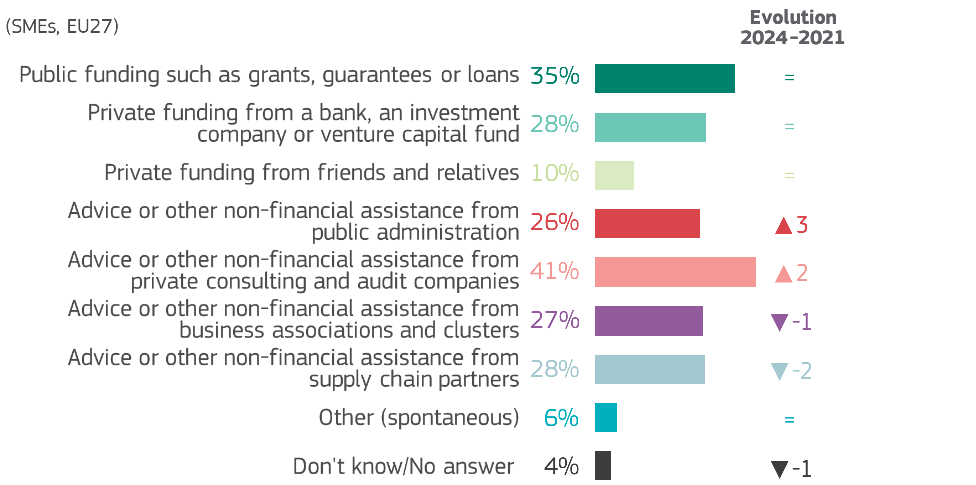
SMEs relying on external support in their efforts to be more resource efficient were asked for more details about the type of external support they receive; they were presented with a list of seven types of support.

More than a third (35%) of SMEs relying on external support in their efforts to be more resource efficient say they receive **public funding**, such as grants, guarantees or loans. Over a quarter (28%) receive **private funding from a bank, investment company or venture capital fund**, and one in ten (10%) receive **private funding from friends and relatives**.

Another large share of SMEs (41%) relying on external support in their efforts to be more resource efficient receive **advice or other non-financial assistance from private consulting and audit companies**, followed by 28% mentioning this type of support from **supply chain partners** and 27% from **business associations and clusters**. About a quarter (26%) of SMEs receive **advice or other non-financial assistance from public administration** in their efforts to be more resource efficient.

The results for this question are in line with the ones observed in 2021 (with no statistical differences in the proportions mentioning each type of external support).

Q6 More precisely, which type of external support is it? [MULTIPLE ANSWERS]



(%, EU27) Base: n=3 095 (SMEs) – **Companies relying on external support in their efforts to be more resource efficient**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

Public and private funding

The larger the SME (in terms of **number of employees**), the more likely they are to receive public **funding**, such as grants, guarantees or loans, for implementing resource efficiency measures (from 35% for micro companies using external funding to 46% for medium-sized ones; the corresponding figure is 37% for companies with 250-499 employees and 42% for companies 500 or more employees). The largest companies, with 500+ employees, are overall the likely to answer that they receive private funding from a bank, an investment company or venture capital fund (36% vs 28% of SMEs).

Micro companies are more likely than larger SMEs to use private funding from friends and relatives (10% vs 4% of medium-sized SMEs).

Private funding from a bank, an investment company or venture capital fund is more frequently mentioned by **gazelles** (39%) and **high-growth SMEs** (41%) than by weak/no-growth SMEs (24%) and negative-growth SMEs (27%).

SMEs in the **manufacturing sector** are the most likely to use public funding, such as grants, guarantees or loans, for implementing resource efficiency measures (46% compared to 31%-34% of SMEs in retail and services and 41% in the industry sector). Public funding is also more frequently mentioned by SMEs **selling both products and services** (44%, compared to 30% of SMEs selling only products and 31% of SMEs selling only services).

SMEs in the **industry sector** are more likely than their counterparts in other sectors to receive private funding from a bank, an investment company or venture capital fund (38% compared to, for example, 25% of SMEs in retail).

Advice and non-financial assistance

For the different forms of advice and non-financial assistance, it is the **larger SMEs** that are more likely to state using this type of assistance. For example, 40% of micro companies relying on external support in their efforts to be more resource efficient receive advice or other non-financial assistance from private consulting and audit companies; this proportion increases to 48% for medium-sized SMEs (and to 60% for companies with 250-499 employees and 71% for companies with 500+ employees).

Looking at SMEs **turnover values**, there is a tendency for larger SMEs to rely on advice or other non-financial assistance from private consulting and audit companies: 36%-38% of SMEs with a turnover of no more than €2 000 000, in contrast with 57%-64% of SMEs with a higher turnover values.

An analysis by sector shows that the lowest proportion of SMEs receiving advice or other non-financial assistance from public administration is observed in the **retail sector** (21%). For advice or other non-financial assistance from private consulting and audit companies, the lowest figure (34%) is observed for SMEs in the **industry sector** (this type of advice is also less popular among SMEs selling both products and services).

Due to the smaller base size for this question, results are not discussed at the individual country level.

Q6 More precisely, which type of external support is it? [MULTIPLE ANSWERS]
(SMEs, EU27)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other (spontaneous)	Don't know/No answer
EU27 (SMEs)	35	28	10	26	41	27	28	6	4
Company size									
Micro (<10 empl.)	35	28	10	26	40	27	27	6	4
Small (10-49 empl.)	41	28	7	30	42	31	35	5	3
Medium-sized (50-249 empl.)	46	32	4	30	48	36	34	5	4
Large (250-499 empl.)	37	33	2	27	60	37	35	4	4
Large (500+ empl.)	42	36	2	42	71	43	52	2	2
Company turnover (2023)									
Up to €100 000	35	28	9	22	36	30	24	8	3
€100 001-€500 000	40	29	8	28	38	26	25	3	3
€500 001-€2 000 000	36	31	15	25	38	29	31	7	5
€2 000 001-€10 000 000	36	25	9	27	64	26	27	7	1
More than €10 000 000	34	21	2	34	57	18	26	3	1
Company growth									
Gazelles	29	39	39	30	32	47	54	1	3
High-growth companies	41	41	6	30	42	24	30	3	4
Weak/no-growth companies	33	24	11	25	42	29	27	6	2
Negative-growth companies	39	27	4	27	29	18	22	7	20
Sector of activity (NACE)									
Manufacturing (C)	46	26	5	28	40	30	26	6	2
Industry (B/D/E/F)	41	38	11	26	34	30	29	4	3
Retail (G)	31	25	8	21	44	25	31	6	3
Services (H/I/J/K/L/M)	34	27	11	29	41	27	26	6	5
Selling products/services									
Products	30	25	9	27	43	31	26	5	5
Services	31	28	8	23	44	26	27	7	4
Both	44	29	13	31	35	26	29	5	5

(%, EU27) Base: n=3 905 (SMEs) & n=363 (Large companies) – **Companies relying on external support in their efforts to be more resource efficient**

.

2.4. What would help SMEs most to go green and resource efficient?

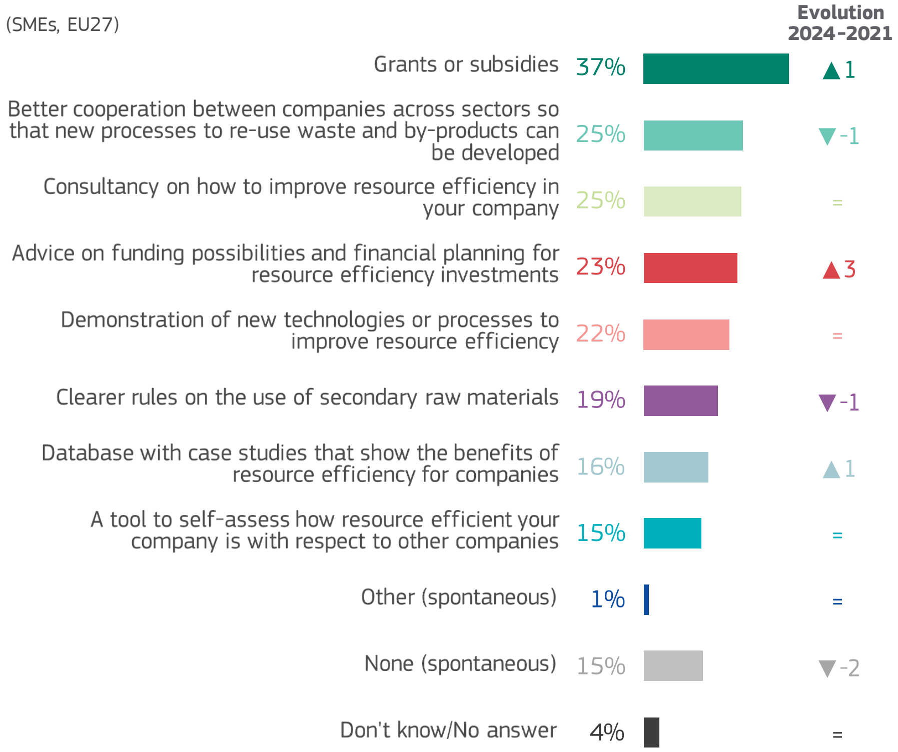
Close to four in ten SMEs (37%) think that grants or subsidies would help their company the most to be more resource efficient; as in 2021, this is the most-mentioned form of assistance.

A tool to self-assess how resource efficient their company is compared to other companies (15%) and a database with case studies showing the benefits of resource efficiency for companies (16%) are selected the least frequently. The remaining forms of assistance are selected by between 19% and 25% of respondents. For example, 22% of SMEs think that a demonstration of new technologies or processes to improve resource efficiency would help their company the most to be more resource efficient.

SMEs are now **somewhat more likely than in 2021** to say that **advice on funding possibilities and financial planning** for resource efficiency investments would help them to become more green and resource efficient (+3 pp, to 23%).

About one in seven SMEs (15%) say that **none of the measures and tools** listed in the survey would help them to be more resource efficient.

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

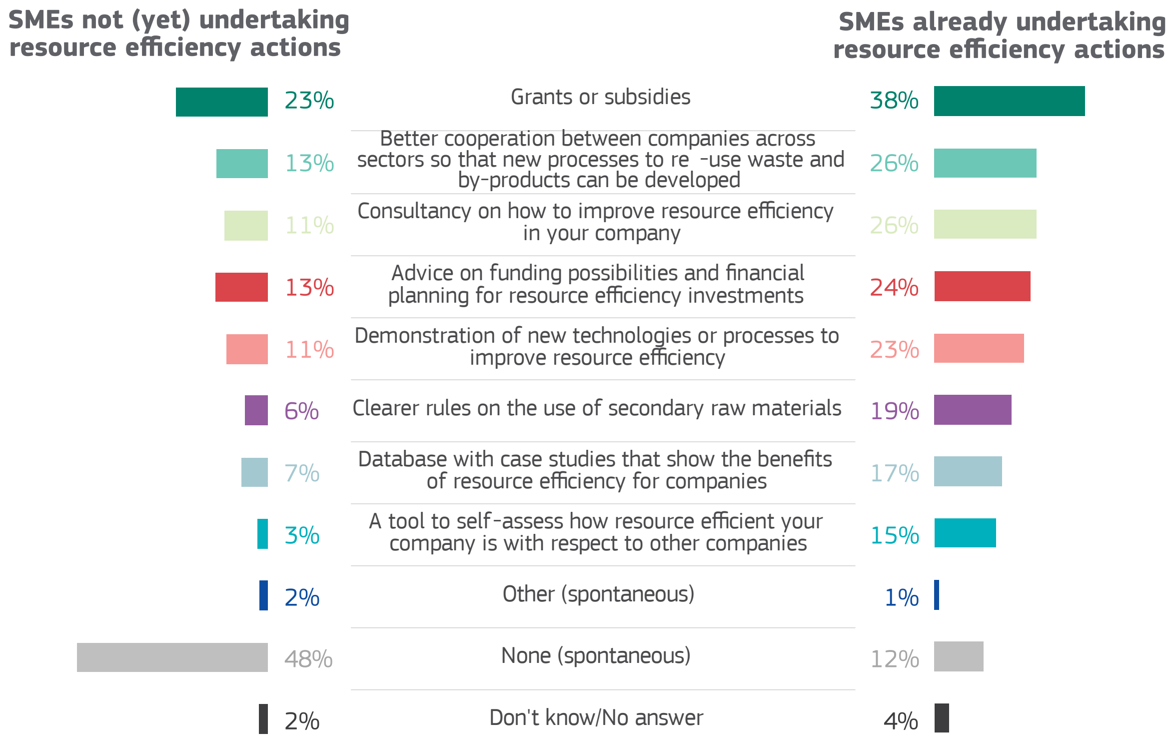
The following figure compares the views of SMEs not yet undertaking resource efficiency actions and those already undertaking such actions.

Among SMEs **already undertaking resource efficiency actions**, the proportion selecting the different support measures and tools varies between 15% for a tool to self-assess how resource efficient their company is and 38% for grants or subsidies. Moreover, among these SMEs, just 12% reply that none of the measures and tools listed in the survey would help them to be more resource efficient.

Among SMEs **not yet taking resource efficiency actions**, however, 48% reply that none of the measures and tools listed in the survey would help them to be more resource efficient and, only for grants and subsidies, more than one in five respondents (23%) reply that these would help them to become more resource efficient.

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

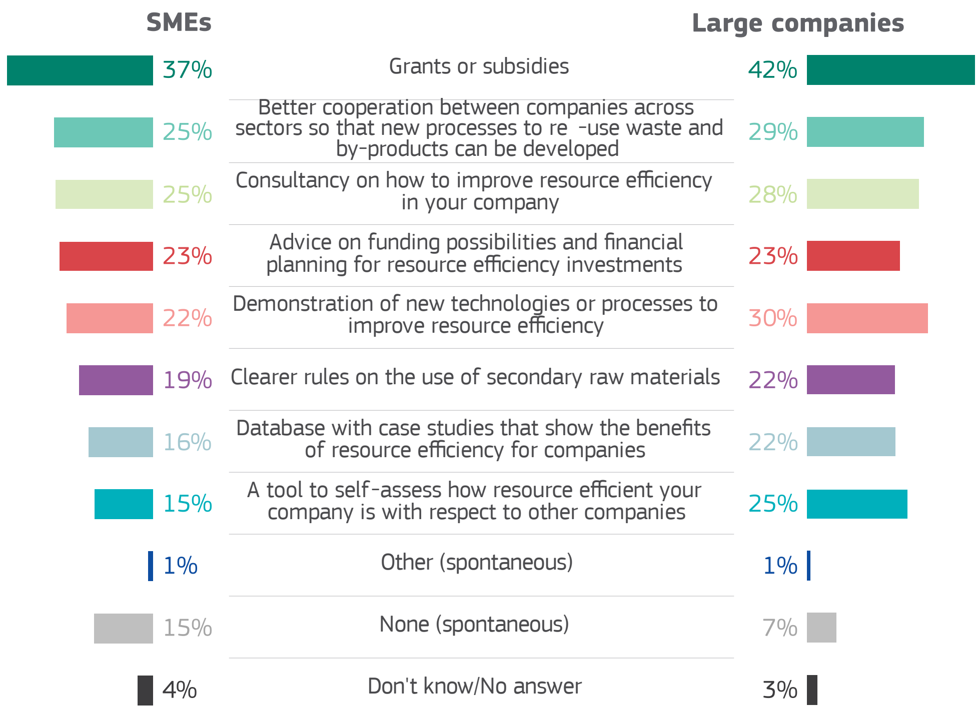
SMEs vs large companies

Both among SMEs and large companies, the largest share of respondents think that **grants or subsidies would help their company the most to be more resource efficient** (selected by 37% of SMEs and 42% of large companies).

For some of the other forms of assistance, preferences of SMEs and large companies deviate; for example, 22% of SMEs say that a demonstration of new technologies or processes to improve resource efficiency would help them the most; among large companies, this view is shared by 30% of respondents. Additionally, while 25% of large companies think that a tool to self-assess how resource efficient their company is compared to other companies would help their company the most; this figure is again lower for SMEs (15%).

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by ecosystem

In line with the EU average results, in all industrial ecosystems, the largest share of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient. For example, this view is shared by 55% of SMEs in 'Textile', 44% in 'Agri-food' and 41% in 'Electronics'.

Across most industrial ecosystems, less than one in five SMEs think that **none of the measures and tools listed in the survey would help** them to be more resource efficient; in 'Health', however, 37% of SMEs reply that none of the measures and tools listed in the survey would help them.

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	51	29	12	20	18	21	9	6	1	19	1
Agri-food	44	32	22	30	22	13	18	12	0	16	3
Construction	37	28	22	24	26	22	18	16	1	12	3
Cultural and creative industries	39	25	26	20	20	18	14	17	2	13	5
Digital	34	24	29	17	26	12	23	15	1	13	5
Electronics	41	12	14	27	16	13	25	24	0	11	6
Energy - renewables	37	22	30	19	21	18	25	17	0	12	3
Energy intensive industries	38	30	17	26	30	23	8	10	0	8	3
Health	36	12	24	24	20	17	10	22	1	37	0
Mobility - Transport - Automotive	36	28	24	25	22	20	17	10	4	15	4
Proximity, social economy and civil security	41	30	21	25	16	20	20	19	1	12	4
Retail	36	23	24	23	20	17	13	14	1	18	3
Textile	55	29	24	19	23	28	17	9	0	5	8
Tourism	36	19	33	29	20	27	15	11	3	8	9

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking response for each ecosystem is shown in dark green and white font.

(%, EU27) Base: n=13 124 (SMEs)

Business demographics

Medium-sized SMEs are generally more likely to say that the various measures and tools listed in the survey would help them to be more resource efficient. For example, 44% mention grants or subsidies, compared to 36% of micro companies. In contrast, 15% of micro-companies and 14% of small companies reply that none of the measures and tools would help them; this figure is 9% for medium-sized companies. An opposite trend is seen looking at SMEs with different turnover values. SMEs with the **highest turnover values** (more than €10 000 000) are the most likely to say that none of the measures and tools listed in the survey would help them to go green (20% vs 11%-15% for SMEs with lower turnover values). There are, of course, two possible reasons for SMEs to select this response: (1) they find the measures listed in the survey not adequate, or (2) SMEs are not looking for support (e.g. because they are already resource efficient and/or manage to implement measures without support).

Grants or subsidies to support resource efficiency efforts are more frequently mentioned by **gazelles** (44%) and **negative-growth SMEs** (44%) than by high-growth SMEs (39%) and weak/no-growth SMEs (35%). Gazelles (38%), followed by high-growth SMEs (28%), are also more likely to reply that advice on funding possibilities and financial planning for resource efficiency investments would help them the most (compared to 21% of negative-growth SMEs and 22% of weak/no-growth SMEs).

An analysis by **sector** shows, for example, that SMEs in manufacturing are more likely than their counterparts in other sectors to think that grants or subsidies would help them the most (43% vs 36%-37%). Among SMEs in the industry sector, 30% say that better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed would help them the most; this figure is somewhat lower in the other sectors (23%-26%).

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	37	25	25	23	22	19	16	15	1	15	4
Company size											
Micro (<10 empl.)	36	25	24	23	22	18	16	14	1	15	4
Small (10-49 empl.)	40	23	26	25	22	21	17	18	2	14	3
Medium-sized (50-249 empl.)	44	25	29	22	28	20	20	20	2	9	2
Large (250-499 empl.)	38	28	30	24	29	20	20	24	1	9	4
Large (500+ empl.)	49	31	25	23	33	25	26	27	1	5	1
Company turnover (2023)											
Up to €100 000	40	24	22	25	21	16	16	14	2	15	4
€100 001-€500 000	36	26	25	24	21	19	18	15	1	13	5
€500 001-€2 000 000	38	23	27	26	23	17	15	17	0	13	4
€2 000 001-€10 000 000	36	30	28	27	24	24	20	18	1	11	2
More than €10 000 000	28	26	29	17	23	16	12	8	0	20	6
Company growth											
Gazelles	44	29	26	33	21	18	18	16	1	13	6
High-growth companies	39	22	26	28	21	18	19	17	1	11	3
Weak/no-growth companies	35	26	24	22	22	19	15	14	1	16	4
Negative-growth companies	44	25	22	21	22	20	16	15	1	16	2
Sector of activity (NACE)											
Manufacturing (C)	43	23	23	26	23	21	18	15	1	12	4
Industry (B/D/E/F)	37	30	24	24	26	21	18	16	1	12	2
Retail (G)	36	26	26	24	20	17	14	13	1	15	4
Services (H/I/J/K/L/M)	36	23	24	23	21	18	16	15	2	16	5
Selling products/services											
Products	36	24	23	23	21	19	17	14	1	15	3
Services	35	25	24	22	21	18	16	15	2	16	5
Both	39	26	27	26	23	19	17	15	1	12	4

(%, EU27) Base: n=13 124 (SMEs) & n=925 (Large companies)

Results by EU Member State

In line with the EU average results, in 25 Member States, the (joint-)largest share of SMEs think that **grants or subsidies** would help their company the most to be more resource efficient. In five Member States, at least half of respondents think that grants or subsidies would help them the most: Slovakia (50%), Slovenia (53%), Greece (56%), Malta (57%) and Cyprus (59%).

In four Member States, at least three in ten SMEs reply that **better cooperation between companies across sectors**, so that new processes to reuse waste and by-products can be developed, would help them the most to be more resource efficient; this applies to Belgium (33%), Spain (32%), the Netherlands (32%) and Romania (30%).

In 17 Member States, at least one in five SMEs say that **consultancy on how to improve resource efficiency in their company** would help them the most; in Italy (29%), this is the most-selected response. This response is overall the highest in Spain (38%).

The proportion of SMEs answering that **advice on funding possibilities and financial planning for resource efficiency investments** would help them the most ranges from 12% in Hungary and the Netherlands to 34% in Lithuania, Malta and Romania. In Portugal, this is the most-selected type of support (mentioned by 29% of SMEs).

The remaining measures tend to be selected by smaller numbers of SMEs in most Member States. For example, in 21 Member States, less than 20% of SMEs answer that clearer rules on the use of secondary raw materials would help them the most when undertaking resource efficiency actions; in Italy, this proportion is higher (28%).

SMEs in France (9%), Portugal (9%) and Spain (6%) are overall the least likely to say that **none of the measures and tools listed in the survey would help them** to be more resource efficient. In Croatia (22%), the Netherlands (23%), Germany (24%), Estonia (25%), Hungary (25%), Latvia (27%), on the other hand, more than one in five SMEs share this view. It is worth adding again that there are, of course, two possible reasons for SMEs to select this response: (1) they find the measures listed in the survey not adequate, or (2) the SMEs are not looking for support (e.g. because they are already resource efficient and/or manage to implement measures without support).

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	37	25	25	23	22	19	16	15	1	15	4
BE	44	33	26	30	29	24	22	24	1	16	1
BG	41	27	24	25	15	19	19	12	0	18	1
CZ	32	23	21	30	28	19	19	8	2	19	2
DK	30	25	30	19	27	9	23	19	6	15	5
DE	34	18	17	15	23	17	21	20	1	24	2
EE	33	22	14	17	19	9	16	7	2	25	2
IE	39	18	14	19	27	15	13	21	0	10	3
EL	56	16	31	31	26	6	16	16	0	12	1
ES	46	32	38	33	23	20	25	23	1	6	4
FR	40	28	23	27	21	17	13	14	3	9	2
HR	45	15	16	18	14	9	9	8	1	22	4
IT	20	28	29	19	23	28	11	11	0	14	7
CY	59	10	30	31	31	11	16	11	0	18	1
LV	28	11	18	19	16	10	9	6	2	27	5
LT	47	22	33	34	24	18	15	12	0	18	0
LU	27	18	22	27	27	21	16	11	4	14	1
HU	47	14	19	12	26	6	10	7	4	25	2
MT	57	28	16	34	17	10	18	11	4	13	4
NL	33	32	28	12	19	10	16	14	0	23	6
AT	32	21	18	31	20	19	24	14	0	13	2
PL	40	16	14	22	15	25	16	14	2	16	5
PT	27	20	22	29	13	17	6	8	2	9	12
RO	45	30	26	34	21	20	17	7	0	11	3
SI	53	15	16	16	13	15	17	8	7	17	0
SK	50	22	26	30	22	16	21	7	2	12	3
FI	32	29	27	13	19	19	18	22	2	19	1
SE	36	24	27	17	22	11	17	19	2	16	6

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking response for each country is shown in dark green and white font.

(%, EU27) Base: n=13 124 (SMEs)

Non-EU countries

For most types of support listed in the survey, **SMEs in the US** are less likely than those in the EU to say that these would help to become more resource efficient. For example, 29% of SMEs in the US answer that grants or subsidies would help them the most, in contrast with 37% of SMEs in the EU.

More than four in ten SMEs in **the UK** (43%), **North Macedonia** (43%), **Switzerland** (46%), **Moldova** (49%), **Serbia** (56%) and **Montenegro** (61%) reply that grants or subsidies would help their SME the most to be more resource efficient. This proportion is lower in Albania (25%), Türkiye (18%), Iceland (23%) and Norway (35%). In **Norway**, a larger share of respondents (37%) think that better cooperation between companies across sectors (so that new processes to reuse waste and by-products can be developed) would help their SME the most. In **Türkiye** (29%) and **Iceland** (33%), the most-mentioned response is a demonstration of new technologies or processes to improve resource efficiency.

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	37	25	25	23	22	19	16	15	1	15	4
UK	43	24	16	31	20	12	14	20	0	12	2
IS	23	20	31	11	33	15	16	16	2	13	11
NO	35	37	16	29	22	14	14	24	3	9	4
CH	46	22	23	19	29	17	20	22	2	14	6
ME	61	18	4	20	18	12	15	6	3	10	4
MD	49	14	32	11	10	29	5	4	6	17	3
MK	43	19	11	14	8	7	5	4	10	22	4
AL	25	21	20	11	8	8	3	4	0	28	0
RS	56	19	21	17	15	13	9	4	2	15	1
TR	18	27	19	24	29	19	18	16	0	23	3
US	29	23	19	20	25	15	14	15	0	25	3

Note: The higher the proportion selecting a response, the darker green/red the cell. The highest-ranking response for each country is shown in dark green and white font.

(%, non-EU countries) Base: n=3 783 (SMEs)

3. Green markets

The next two chapters of this report focus on **green markets for SMEs**. For the purpose of this survey, **green products and services** are defined as products and services with a predominant function of **reducing environmental risk and minimising pollution and resources**; this may also include products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content, or eco-designed etc.).

In this chapter, the proportion of SMEs currently **offering green products or services** is discussed, as well as the proportion of turnover that green products or services represent for these SMEs. SMEs selling products were also asked about the **share of recycled materials** used in their products and wether they have an **explicit policy in place to extend the life span of their products** (e.g. choosing durable materials, dedicated repair services for customers etc.)?

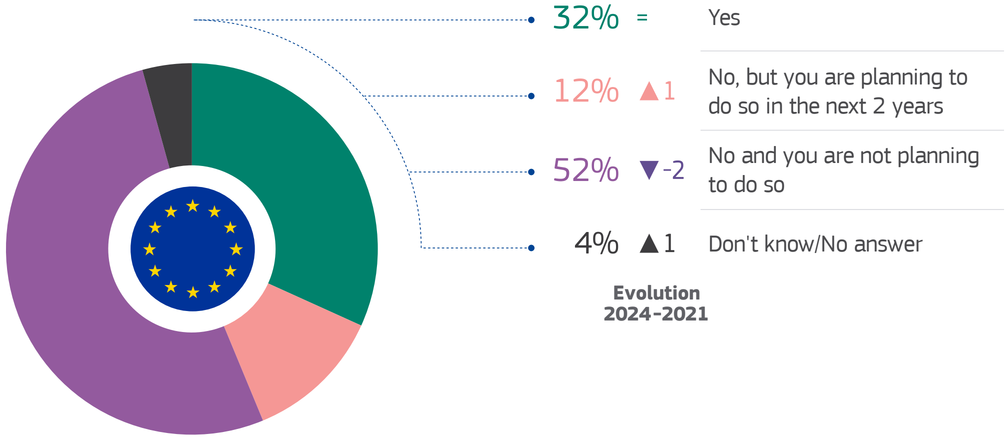
3.1. SMEs offering green products or services

About one in three (32%) SMEs in the EU **offer green products or services**, with a further 12% **planning to do so in the next two years**. A slim majority of SMEs do not offer green products or services and have no plans to do so (52%).

The proportion of SMEs currently offering green products or services and the proportion planning to do so in the next two years have remained about the same **as in 2021**. The proportion of SMEs not offering green products or services and having no plans to do so has decreased by two percentage points compared to 2021.

Q9 Does your company offer green products or services?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

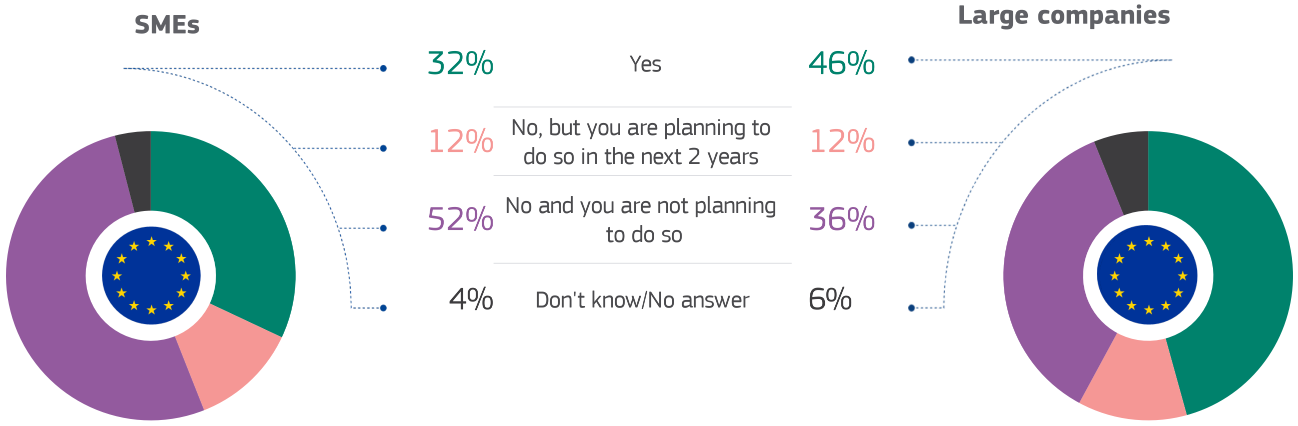
SMEs vs large companies

Large companies are more likely to currently offer green products or services (46% vs 32% of SMEs). SMEs and large companies, however, are as likely to reply that they do not yet offer green products and services, but are **planning to do so in the next two years** (both 12%).

Among large companies, over one third (36%) are not offering green products or services and having no plans to do so; this group still represents a slim majority among SMEs (52%, -2 pp compared to 2021).

Q9 Does your company offer green products or services

(SMEs vs large companies, EU27)



(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

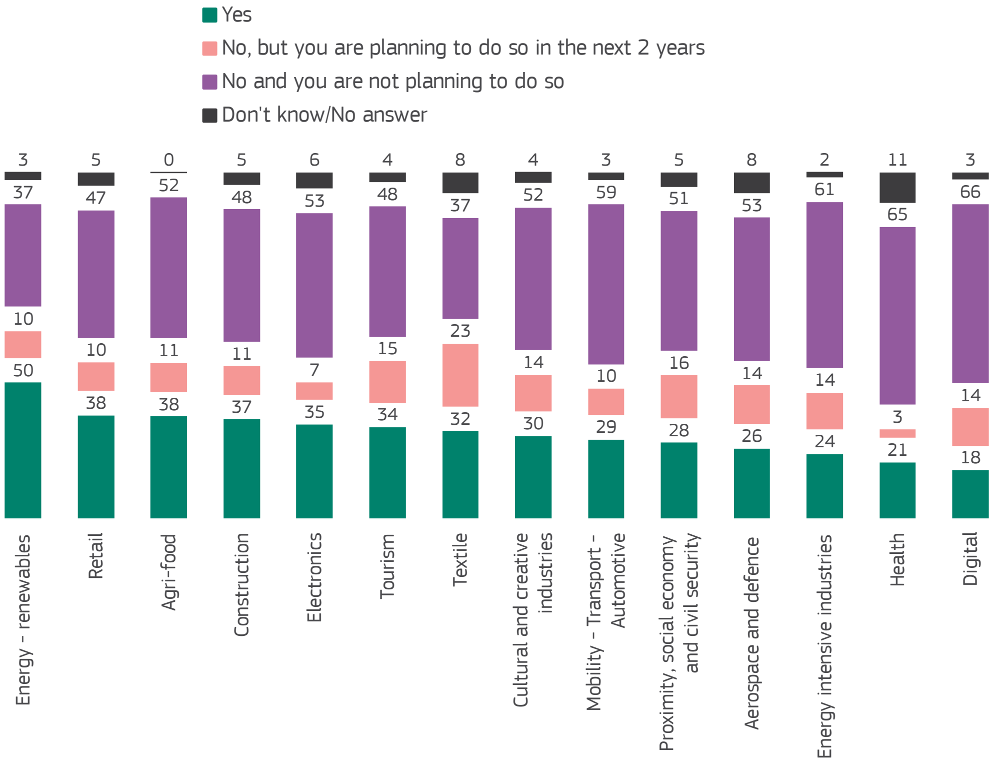
Results by ecosystem

Half of SMEs in 'Energy – renewables' answer that their company **offers green products or services**; this proportion is 38% in the industrial ecosystems 'Retail' and 'Agri-food' and 37% in 'Construction'. In the industrial ecosystem 'Textile', 23% of SMEs reply that they do not offer green products or services but have **plans to introduce these in the next two years**.

The largest shares of SMEs that do **not offer green products or services and have no plans** to do so are observed in the industrial ecosystems of 'Digital' (66%) and 'Health' (65%).

Q9 Does your company offer green products or services?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

Business demographics

The **largest SMEs** (with between 50 and 249 employees) are the most likely to have green products or services in their offer (36% vs 32%). Similarly, medium-sized companies are slightly more likely than micro and small companies (15% vs 11%-12%) to plan to offer green products or services in the next two years. Comparing SMEs in terms of **turnover values**, the largest difference is seen between SMEs with a turnover between €500 000 and €10 000 000 and those with lower or higher turnover values. Among the former, 36%-38% are selling green products or services; among SMEs with lower or higher turnover values this share is 29%-30%.

Gazelles (37%) and **high-growth companies** (34%) are somewhat more likely than negative-growth or weak/no-growth companies (both 31%) to have green products or services in their offer. Among negative-growth companies, 57% say that that they do not offer green products or services and also have no plans to do so.

One in three SMEs in **manufacturing** (33%) answer that their company offers green products or services. Among SMEs in **industry** (37%) and **retail** (39%), this proportion is somewhat higher than in manufacturing. In the **services** sector, however, just 26% of SMEs report to have a green offer.

In line with the differences observed by activity sector, SMEs are more likely to be **selling green products** than **green services**. Among SMEs selling only products, 36% reply that they have green products on offer; the corresponding figure for SMEs only selling services is 25%.

Q9 Does your company offer green products or services?
(SMEs, EU27)

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
EU27 (SMEs)	32	12	52	4
Company size				
Micro (<10 empl.)	32	12	52	4
Small (10-49 empl.)	32	11	53	3
Medium-sized (50-249 empl.)	36	15	46	4
Large (250-499 empl.)	41	11	41	7
Large (500+ empl.)	54	14	28	5
Company turnover (2023)				
Up to €100 000	29	14	53	5
€100 001-€500 000	30	13	53	3
€500 001-€2 000 000	36	12	48	4
€2 000 001-€10 000 000	38	11	48	4
More than €10 000 000	29	8	60	3
Company growth				
Gazelles	37	12	47	4
High-growth companies	34	11	50	5
Weak/no-growth companies	31	13	52	4
Negative-growth companies	31	9	57	3
Sector of activity (NACE)				
Manufacturing (C)	33	14	49	4
Industry (B/D/E/F)	37	12	46	5
Retail (G)	39	11	46	4
Services (H/I/J/K/L/M)	26	12	58	4
Selling products/services				
Products	36	10	49	5
Services	25	13	58	4
Both	39	12	45	4

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

Results by EU Member State

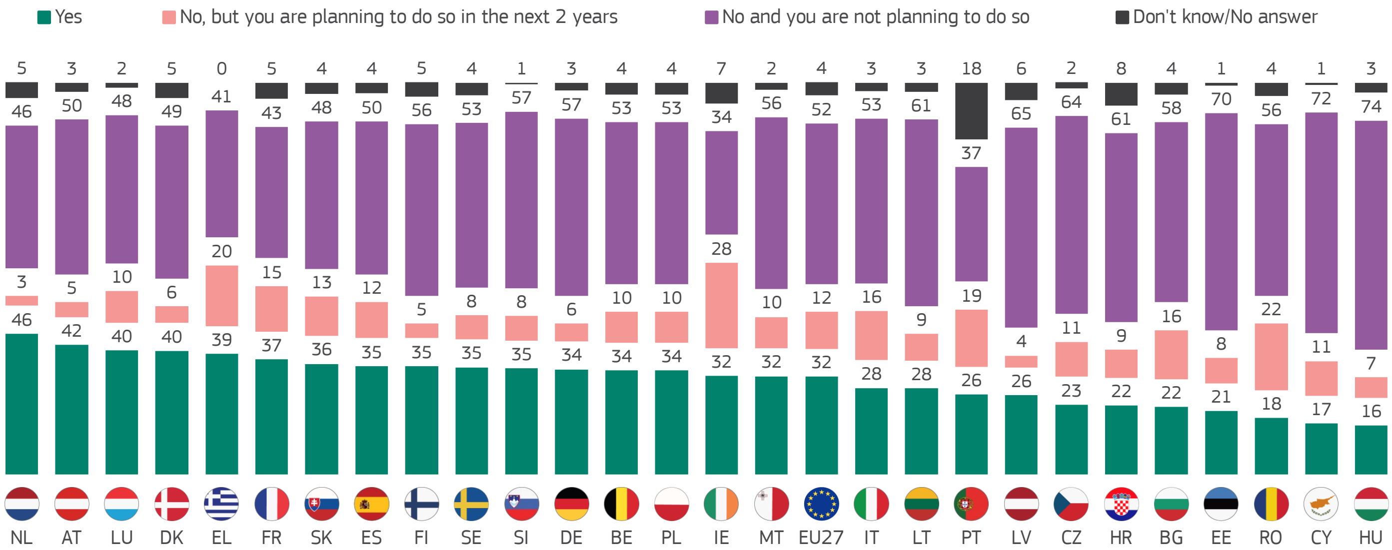
At least about one in five SMEs across most Member States **currently offer green products or services**. SMEs in the Netherlands (46%), followed by those in Austria (42%), Luxembourg (40%), Denmark (40%) and Greece (39%), are the most likely to be doing so, while those in Hungary (16%), Cyprus (17%) and Romania (18%) are the least likely.

SMEs in Ireland (28%) are the most likely to say they are not currently offering green products or services but are **planning to do so in the next two years**. In another three Member States, about one in five SMEs plan to launch green products or services in the next two years: 19% in Portugal, 20% in Greece and 22% in Romania.

The proportion of SMEs **not offering green products or services and having no plans to do so** remains a majority in 17 Member States, with the overall highest shares observed in Hungary (75%), Cyprus (72%) and Estonia (70%).

Q9 Does your company offer green products or services?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

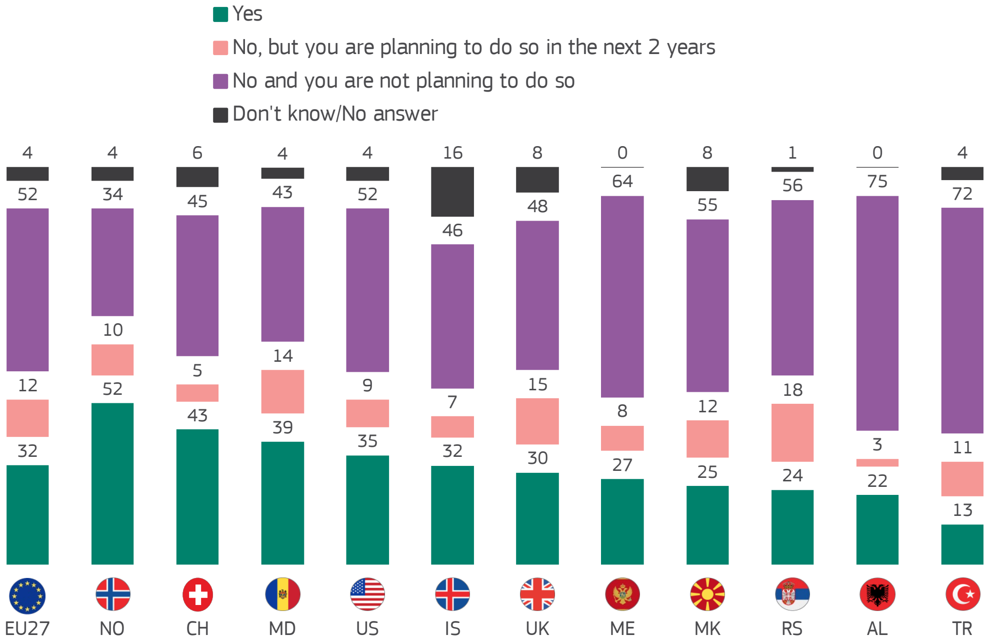
Non-EU countries

SMEs in the US are about as likely as SMEs in the EU to offer green products or services (35% and 32%, respectively). The proportion of SMEs with plans to start offering green products or services is also similar in the US and across the EU (9% and 12%, respectively).

The proportion of SMEs offering green products or services is 13% in **Türkiye** and then increases to 43% in **Switzerland** and 52% in **Norway**. SMEs in Switzerland are among the least likely to have plans to start offering green products or services (5%); this proportion is also low, for example, in Iceland (7%). SMEs in the latter two countries, however, are likely to be already offering green products or services. In **Türkiye** (72%) and **Albania** (75%), on the other hand, more than seven in ten SMEs do not offer green products and have not plans to do so in the future.

Q9 Does your company offer green products or services?

(SMEs, non-EU countries)



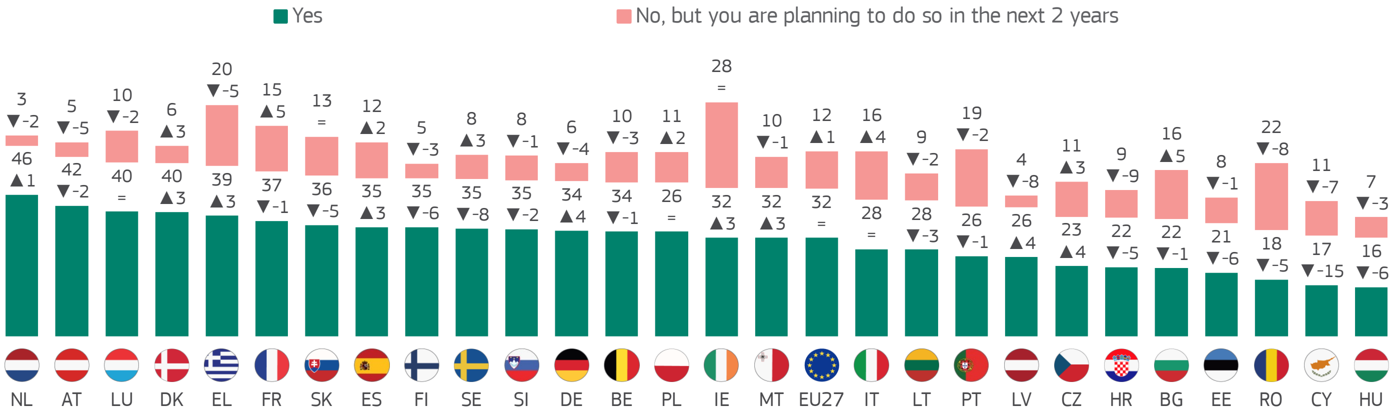
(%, non-EU countries) Base: n=3 783 (SMEs)

Trend compared to 2021

In five Member States, the proportion of SMEs offering green products or services has decreased by more than five percentage points **compared to 2021**. The largest decreases are observed in Cyprus (-15 pp, to 17%) and Sweden (-8 pp, to 35%). The share of SMEs with plans to start offering green products or services has decreased by more than five percentage points in three Member States: Croatia (-9 pp, to 9%), Romania (-8 pp, to 22%), Latvia (-8 pp, to 4%) and Cyprus (-7 pp, to 11%).

Q9 Does your company offer green products or services?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

3.2. Turnover attributed to green products and services

SMEs offering green products and services were also asked how much of their annual turnover of the latest available fiscal year was attributed to these products and services.

For the largest share (44%) of SMEs selling green products and services, these products and services **make up not more than 10% of their most recent annual turnover**. About one in five (22%) reply that green products and services represent between 11% and 50% of their annual turnover and a slightly higher proportion (24%) answer that the sale of such products and services makes up more than 50% of their turnover. These results present no significant change compared to 2021.

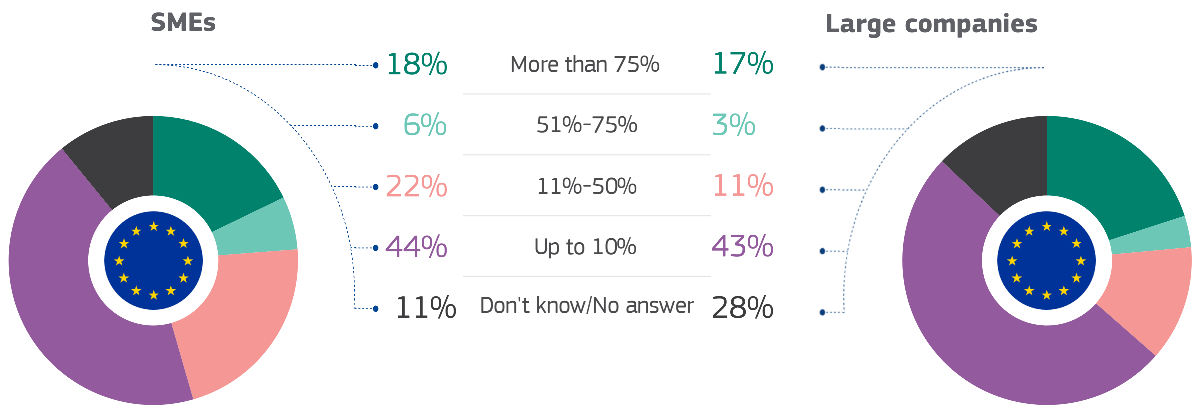
SMEs vs large companies

Large companies are somewhat less likely than SMEs to say that more than 50% of their annual turnover comes from green products or services (20% vs 24%). A similar difference can be noted for the category 'between 11% and 50%' (22% vs 11%, respectively). Among large companies, a larger share of respondents could not say how much of their annual turnover is attributed to green products and services (28% vs 11% for SMEs).

Differences in terms of other business demographics are minor and do not reach statistical significance.

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

(SMEs vs large companies, EU27)



(%, EU27) Base: n=4 280 (SMEs) & n=397 (Large companies) – **Companies offering green products or services**

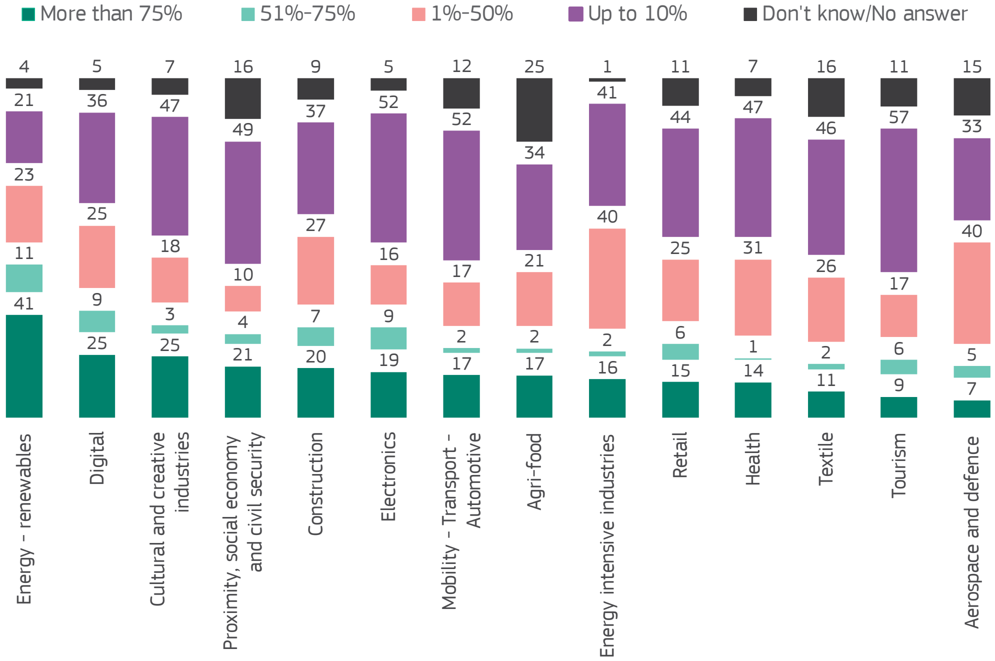
Results by ecosystem

The ecosystem **'Energy – renewables'** stands out with **41% of SMEs with a green offer that** say that the sale of such products and services makes up **more than 75% of their turnover of the latest fiscal.** In the other ecosystems, this share varies between 7% ('Aerospace and defence') and 25% ('Digital' and 'Cultural and creative industries').

Across almost all ecosystems, a considerable share of SMEs selling green products and services report that these products and services make up **not more than 10% of their most recent annual turnover**. For example, this response is given by 57% of SMEs in 'Tourism' and 52% in both 'Mobility – Transport – Automotive' and 'Electronics'.

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

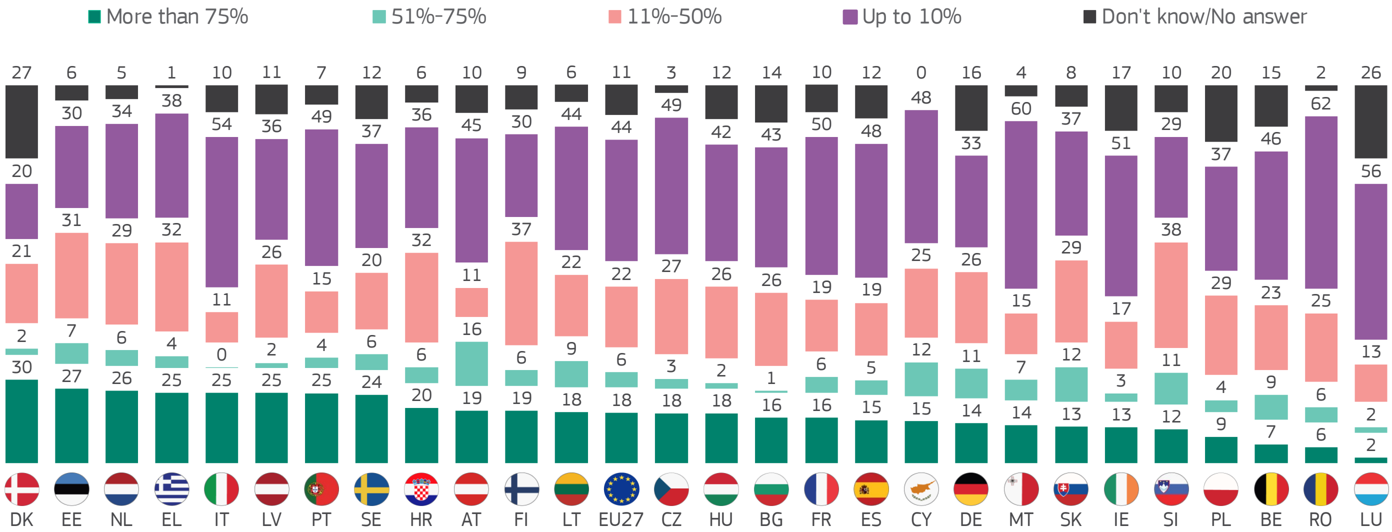
Results by EU Member State

Across most Member States, the largest share of SMEs selling green products and services answer that these products and services make up **not more than 10% of their most recent annual turnover**. This response is given, for example, by 54% of respondents in Italy, 56% in Luxembourg, 60% in Malta and 62% in Romania.

In most of the countries at the left-hand side of the figure below, SMEs are more likely to say that green products or services make up **more than 10% of their annual turnover**. Moreover, in Austria, Denmark, Estonia and the Netherlands, about one in three SMEs selling green products and services state that these products and services make up **more than 50%** of their most recent annual turnover (between 32% and 35%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

(SMEs, EU27)



(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

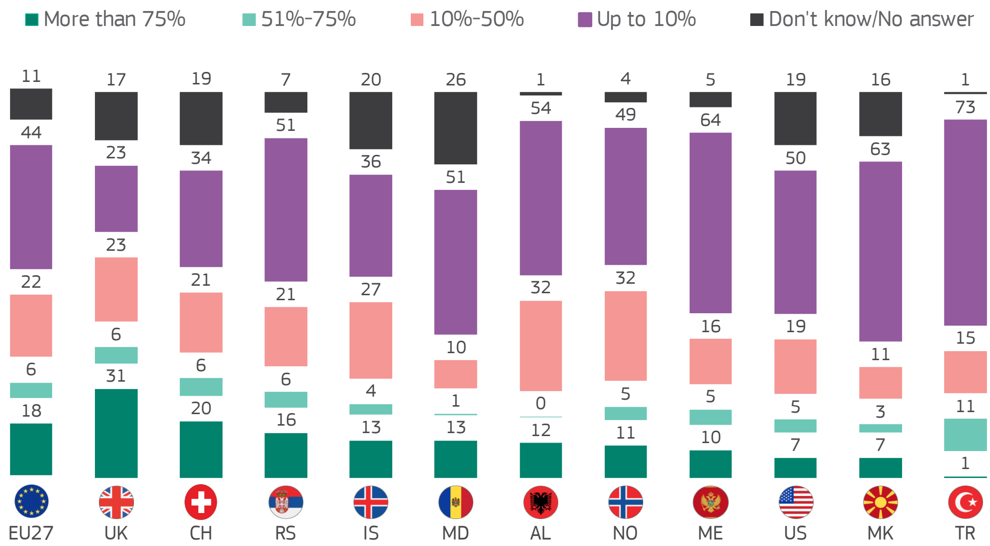
Non-EU countries

In **the US**, 50% of SMEs selling green products and services answer that these products and services make up not more than 10% of their most recent annual turnover; the average figure for the EU is somewhat lower at 44%. In comparison, in **Türkiye** (73%), **Montenegro** (64%) and **North Macedonia** (63%), more than six in ten SMEs say the same (due to smaller number of interviews in Montenegro, this figure should be interpreted with caution).

In **the UK**, more than a third of SMEs (37%) selling green products and services state that these products and services make up more than 50% of their most recent annual turnover; this figure is also higher in **Switzerland** (26%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

(SMEs, non-EU countries)



(%, non-EU countries) Base: n=1 293 (SMEs) – **Companies offering green products or services**

Trend compared to 2021

To analyse the trend in SMEs' turnover attributed to green products or services, the results for this question are presented **taking into account all SMEs** (meaning that it is assumed that SMEs not selling green products or services also do not have any turnover attributed to these products in the latest available fiscal year).

Across the EU, **14% of SMEs say that more than 10% of their annual turnover is attributed to green products and services**; this proportion has remained stable compared to 2021.

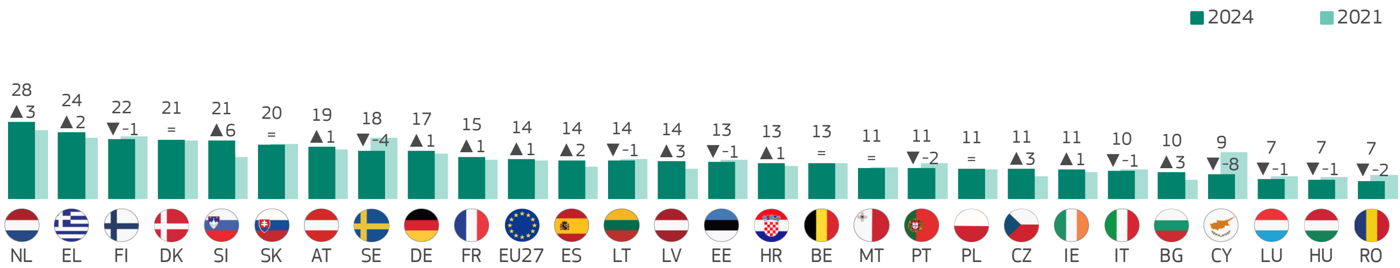
At the **individual country level**, the total share of SMEs with more than 10% of their annual turnover of the last fiscal year attributed to the sale of green products and services ranges from 7% in Hungary, Luxembourg and Romania to 28% in the Netherlands. The Netherlands was also found at the top of the country ranking in 2021.

In Cyprus, there is a decrease in SMEs with more than 10% of turnover attributed to green products and services (-8 pp, to 9%), with the opposite is seen in Slovenia (+6 pp, to 21%).

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year? [MULTIPLE ANSWERS]

(SMEs, EU27)

% More than 10%



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

3.3. Share of recycled material in products

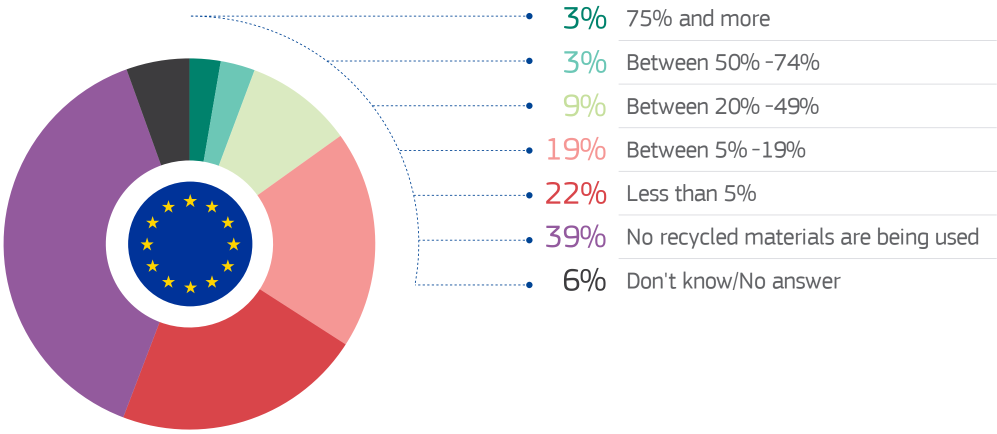
SMEs selling products were asked if they use recycled materials in their products. Among these SMEs selling products, **56% report that they use recycled materials in their products**.

More specifically, 3% say that the share of recycled materials in their products is at least 75%, 3% answer that the share is between 50% and 74% and 9% that it is between 20% and 49%. These three proportions sum to 15% – meaning that **15% of SMEs selling products report that the share of recycled materials in their products is at least 20%.**

The largest shares of SMEs, however, report that the share of recycled materials in their products **remains below 20%**: 19% of SMEs selling products report that between 5% and 19% of materials in their products are recycled materials and 22% that the share is less than 5%. About four in ten SMEs (39%) have no recycled materials in their products.

N2 Does your company use recycled materials in your products?
If yes, what is the share of recycled materials in your products/production?

(SMEs, EU27)



(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

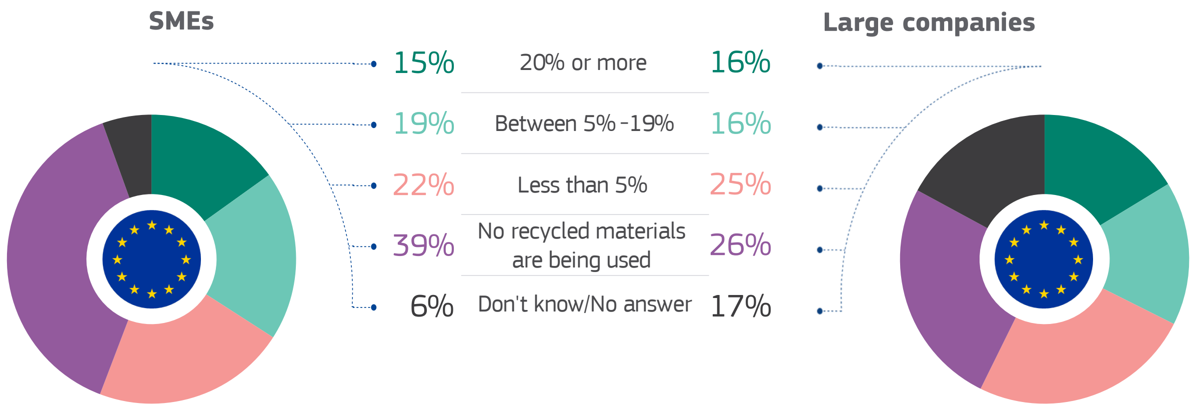
SMEs vs large companies

As noted above, **15% of SMEs selling products reply that the share of recycled materials in their products is at least 20%; this proportion is nearly the same for large companies (16%)**. The share of companies for which the share of recycled materials is between 5% and 19%, however, is slightly higher among SMEs than among large companies (19% vs 16%). It should, however, also be noted that there is a larger degree of uncertainty among respondents in large companies with 17% saying that they do not know what the share of recycled materials is in their products; this proportion is much lower for SMEs (6%).

Differences in terms of other business demographics do not reach statistical significance and, as such, are not discussed.

N2 Does your company use recycled materials in your products?
If yes, what is the share of recycled materials in your products/production?

(SMEs vs large companies, EU27)



(%, EU27) Base: n=8 194 (SMEs) & n=599 (Large companies) – **Companies selling products**

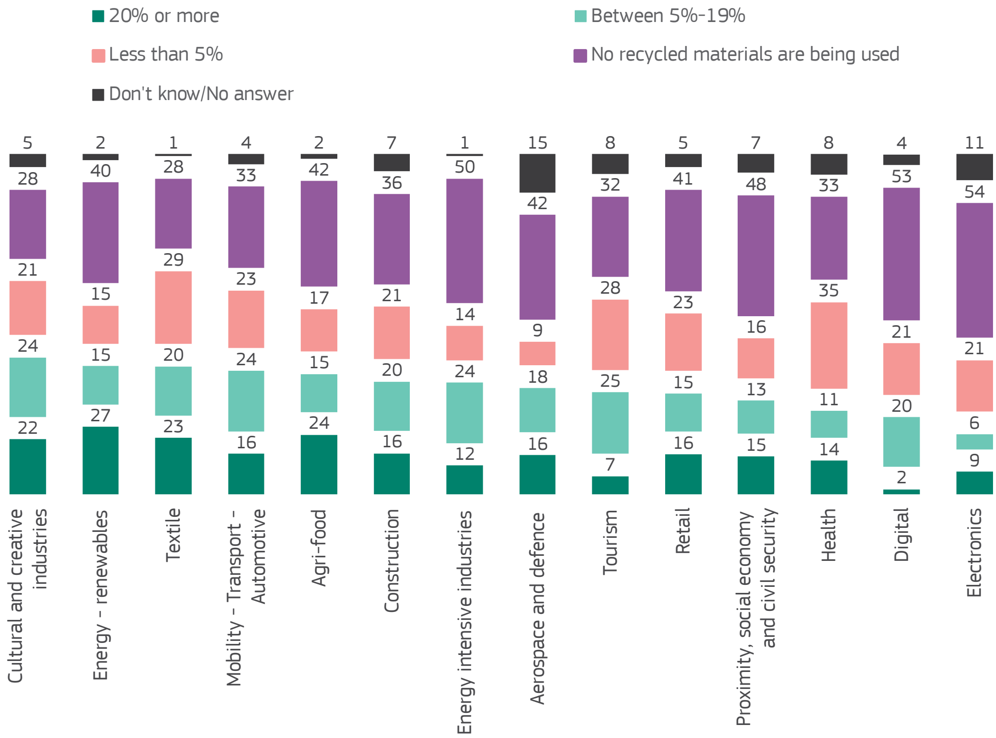
Results by ecosystem

The share of SMEs selling products and using recycled materials in their products **varies quite substantially across ecosystems**. Focusing first on the share saying they do NOT use recycled materials, this share ranges from 28% in both 'Cultural and creative industries' and 'Textile' to 54% in 'Electronics'.

SMEs in 'Energy – Renewables' are most likely to say that **at least 20% of materials used in their products are recycled materials** (27%); this figure is also higher, for example, in the ecosystem 'Agri-food' (24%).

N2 Does your company use recycled materials in your products?
If yes, what is the share of recycled materials in your products/production?

(Ecosystems, SMEs, EU27)



	Cultural and creative industries	Energy - renewables	Textile	Mobility - Transport - Automotive	Agri-food	Construction	Energy intensive industries	Aerospace and defence	Tourism	Retail	Proximity, social economy and civil security	Health	Digital	Electronics
Don't know/No answer	5	2	1	4	2	7	1	15	8	5	7	8	4	11
No recycled materials are being used	28	40	28	33	42	36	50	42	32	41	48	33	53	54
Less than 5%	21	15	29	23	17	21	14	9	28	23	16	35	21	21
Between 5%-19%	24	15	20	24	15	20	24	18	25	15	13	11	20	6
20% or more	22	27	23	16	24	16	12	16	7	16	15	14	2	9

(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

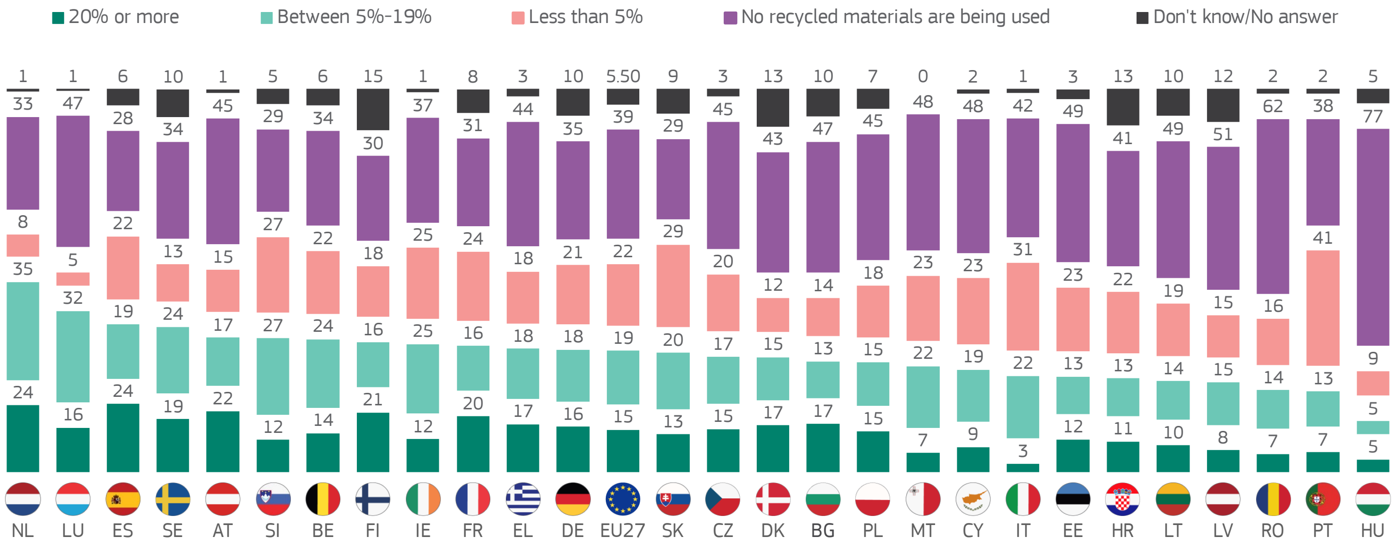
Results by EU Member State

The proportion of SMEs **using 20% or more of recycled materials** in their products/production ranges from 3% in Italy to 24% in the Netherlands and Spain. In Sweden (19%), France (20%) and Finland (21%), about one in five SMEs selling products report that at least 20% of recycled materials is used. The proportion saying that the share of recycled materials in their products is **between 5% and 19%** varies between 5% in Hungary and 35% in the Netherlands.

Finally, the share of SMEs selling products, but answering that **no recycled materials are being used** is the highest in Hungary (77%) and the lowest in Spain (28%).

N2 Does your company use recycled materials in your products?
If yes, what is the share of recycled materials in your products/production?

(SMEs, EU27)



(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

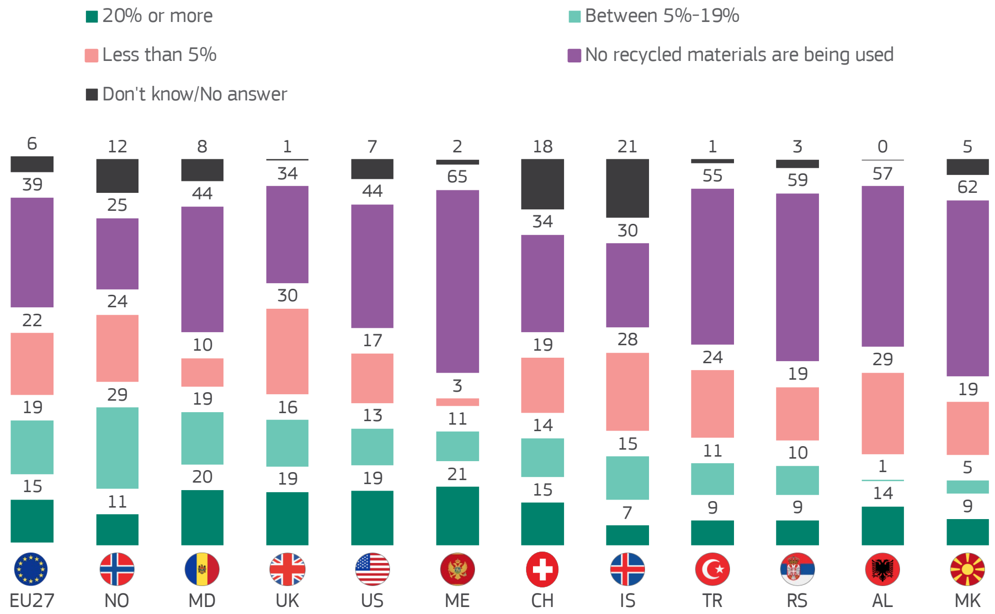
Non-EU countries

In **the UK** and **the US**, about one in five SMEs (both 19%) selling products answer that at least **20% of the materials they use are recycled materials**; this share is a few percentage points higher than the average EU share (15%).

In the countries at the right-hand side of the chart, however, a larger share of SMEs report that they **do not use any recycled materials** in their products; such as, 62% in **North Macedonia**, 59% in **Serbia** and 55% in **Turkey**.

N2 Does your company use recycled materials in your products?
If yes, what is the share of recycled materials in your products/production?

(SMEs, non-EU countries)



(%, non-EU countries) Base: n=2 491 (SMEs) – **Companies selling products**

3.4. Life span of products

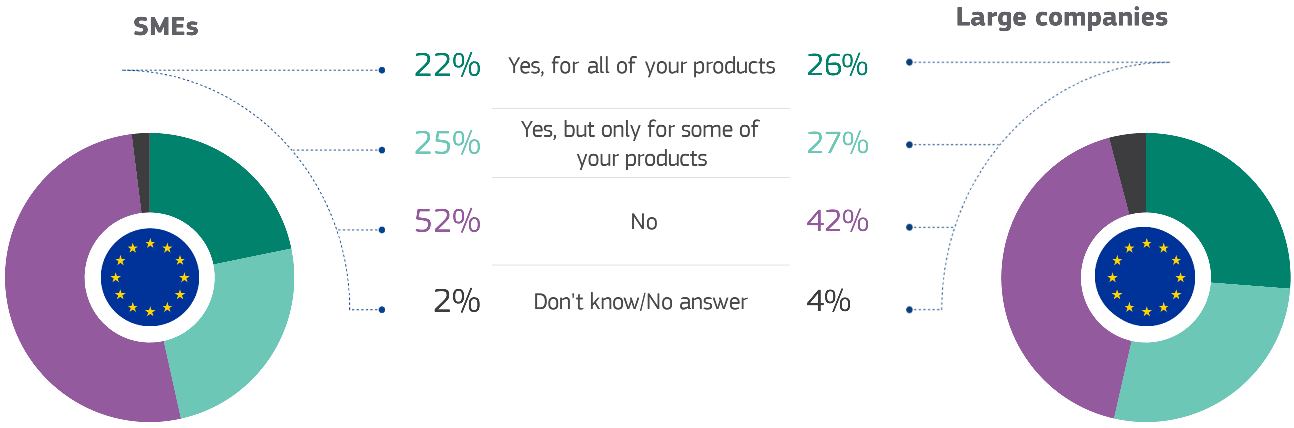
About half of SMEs selling products answer that their company has an explicit policy to extend the life span of their products (e.g. choosing durable materials, dedicated repair services for customers etc.): 22% say they have such a policy for all their products and 25% for some of their products.

SMEs vs large companies

Compared to SMEs, **large companies are somewhat more likely to report they have an explicit policy to extend the life span of their products** for all their products (26% vs 22%) or for some of their products (27% vs 25%).

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(SMEs vs large companies, EU27)



(%, EU27) Base: n=8 194 (SMEs) & n=599 (Large companies) – **Companies selling products**

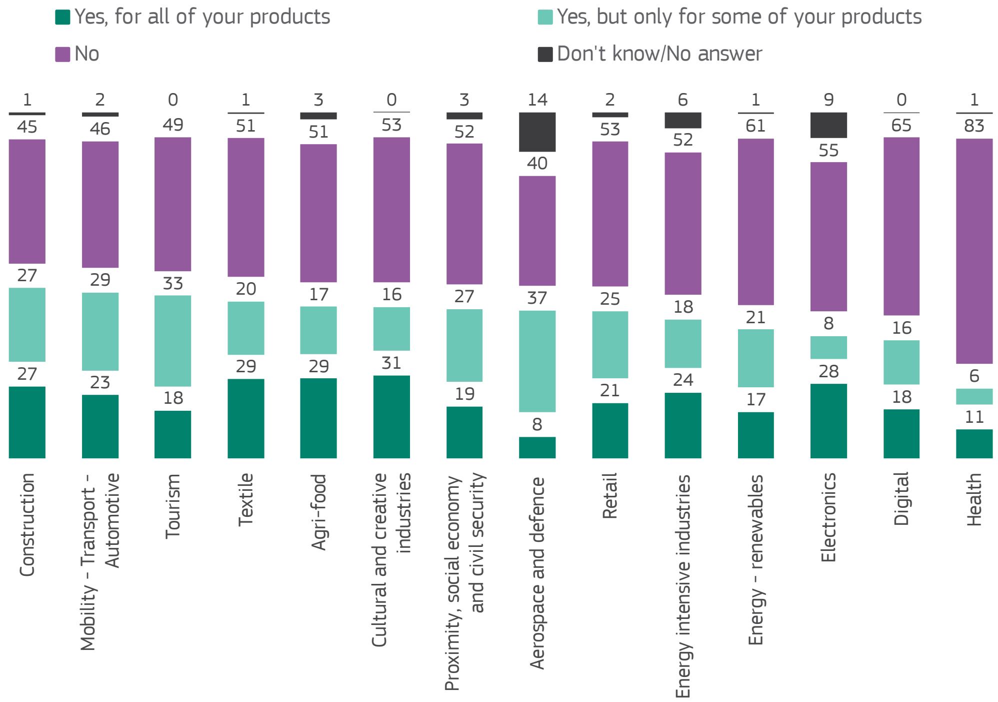
Results by ecosystem

The **largest share** of SMEs selling products and saying that they have **an explicit policy to extend the life span of their products** is observed for the ecosystem **'Construction'** (27% 'for all of products' and 27% 'for some products'). The ecosystem of **'Health' is found at the other end of the spectrum** with 83% of SMEs saying that they do not have such a policy in place for any of their products.

Although the ecosystem of **'Energy – Renewables'** is usually found at the higher end of the ranking, when it comes to the share of SMEs with a policy to extend the life span of their products, they rank closer to the ecosystem of 'Health', with 61% reporting not to have a policy in place for any of their products.

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(Ecosystems, SMEs, EU27)



(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

Business demographics

Some observations can also be made in terms of the type of **SMEs that are more likely to have an explicit policy in place to expand the life span of their products**. For example, SMEs in **manufacturing** are more likely to say that they have such a policy in place for all of their products (29% vs 20% to 23% in the other activity sectors) and SMEs in **industry** are more likely to say they have this type of policy in place for some of their products (30% vs 19% to 25% in the other sectors). Additionally, especially **gazelles** are more likely to report that they have an explicit policy to extend the life span of all of their products (33% vs e.g. 22% of high-growth companies).

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(SMEs, EU27)

	Yes, for all of your products	Yes, but only for some of your products	No	Don't know/No answer
EU27 (SMEs)	22	25	52	2
Company size				
Micro (<10 empl.)	22	25	51	2
Small (10-49 empl.)	19	22	57	3
Medium-sized (50-249 empl.)	18	25	53	5
Large (250-499 empl.)	29	28	43	1
Large (500+ empl.)	22	27	42	9
Company turnover (2023)				
Up to €100 000	26	27	47	1
€100 001-€500 000	24	25	50	1
€500 001-€2 000 000	22	23	53	2
€2 000 001-€10 000 000	15	27	54	3
More than €10 000 000	24	26	48	3
Company growth				
Gazelles	33	17	50	0
High-growth companies	22	25	51	2
Weak/no-growth companies	22	25	52	2
Negative-growth companies	23	23	51	2
Sector of activity (NACE)				
Manufacturing (C)	29	19	50	3
Industry (B/D/E/F)	23	30	46	1
Retail (G)	22	24	53	2
Services (H/I/J/K/L/M)	20	25	54	1

(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

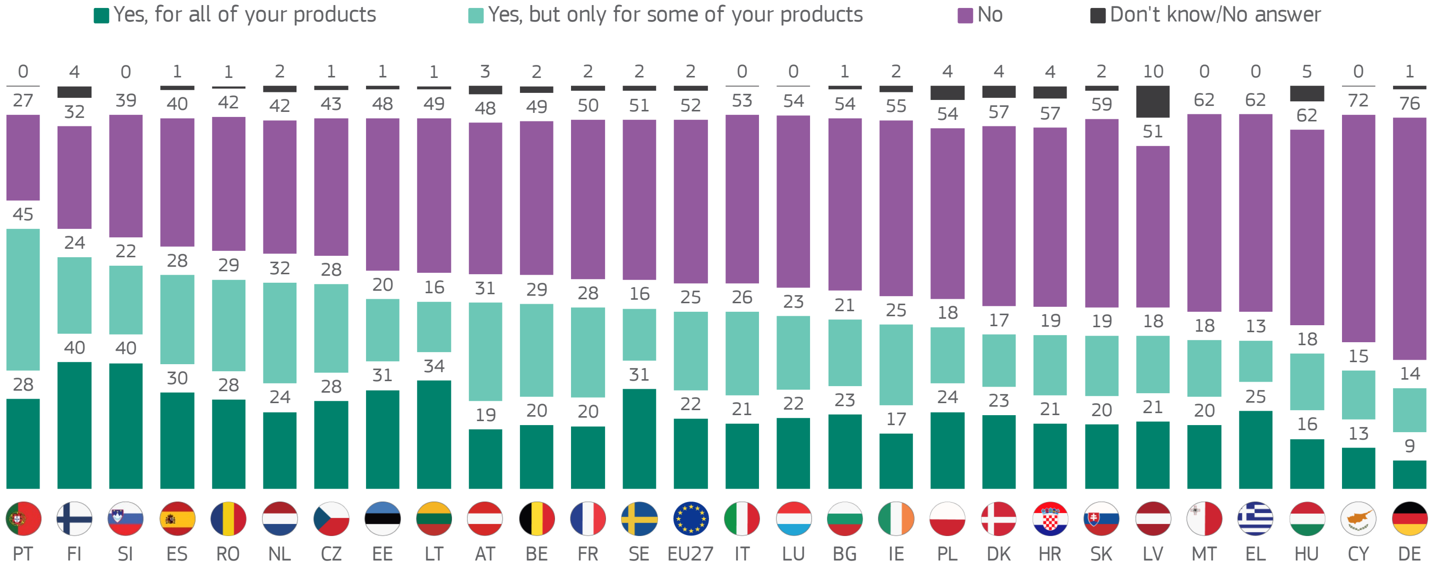
Results by EU Member State

Between 23% of SMEs selling products in Germany and 73% in Portugal report that they have **an explicit policy to extend the life span of at least some of their products**. In Finland and Slovenia, 40% of SMEs report to have an explicit policy for **all of their products**, while in Portugal, the largest share (45%) say they have an explicit policy for only **some of their products**.

SMEs in Germany (76%), followed by SMEs in Cyprus (72%), are overall the most likely to answer that they do **not have an explicit policy to extend the life span for any of their products**.

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(SMEs, EU27)



(%, EU27) Base: n=8 194 (SMEs) – **Companies selling products**

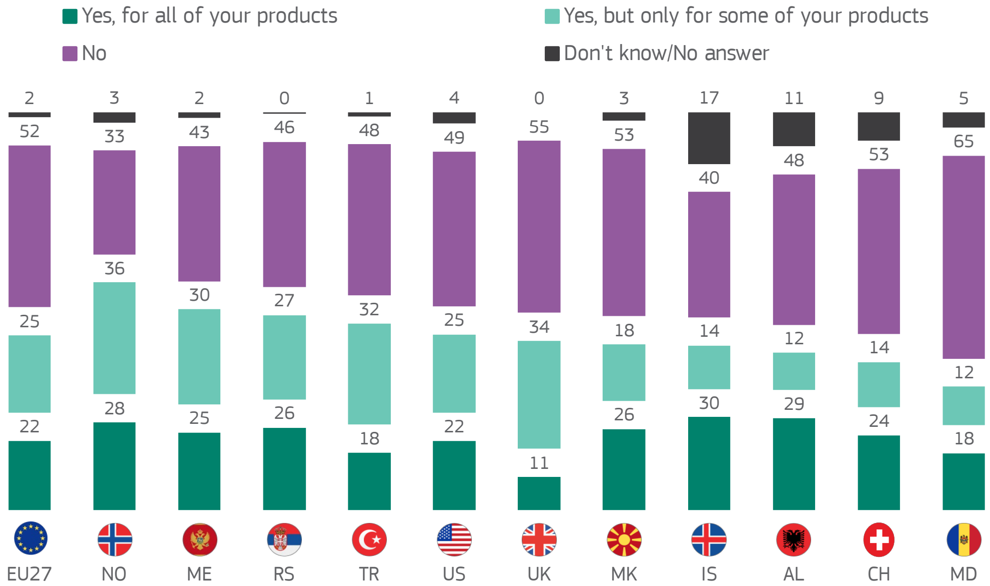
Non-EU countries

SMEs in **Norway** are the most likely in the non-EU countries to have **an explicit policy to extend the life span of their products** (28% **'for all of products'** and 36% **'for some products'**). In **Switzerland**, 24% of SMEs answer that they have a policy to extend the life span of all of their products (vs 28% in Norway), but just 14% say they have this type of policy for only some of their products (vs 36% in Norway).

SMEs in **Moldova** are the most likely to say they do not to have a policy in place to extend the lifespan for any of their products (although some caution should be exercised to interpret this figure, due to the smaller number of interviews in this country).

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(SMEs, non-EU countries)



(%, non-EU countries) Base: n=2 491 (SMEs) – **Companies selling products**

4. Supporting SMEs with their green offer

The analysis of green markets continues with a review of the **types of support** SMEs receive for producing their green products or services. The final sections in this chapter discuss SMEs' views on the **type of support or assistance that would help them the most to launch or expand** their own range of green products or services.

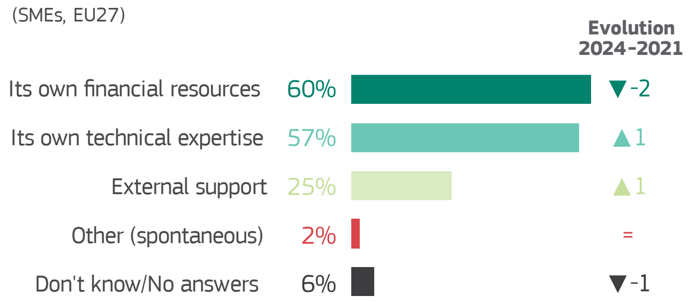
4.1. Type of support for the production of green products and services

Among SMEs offering green products and services, 60% rely on their **own financial resources** and 57% on their **own technical expertise** for the production of these products and services. About a quarter (25%) of these SMEs rely on **external support**. These results present no significant change compared to 2021.

SMEs vs large companies

Compared to SMEs, **large companies are more likely to rely on their own financial resources** (70% vs 60%), **their own technical expertise** (70% vs 57%) and **external support** (29% vs 26%) for the production of green products and services.

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]



(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

Results by ecosystem

Across ten of the 14 industrial ecosystems, the largest share of SMEs with a green offer say that they rely on **their own financial resources** for the production of their green products or services (e.g. 79% in 'Tourism' and 74% in 'Agri-food').

In line with the results for type of support to increase resource efficiency (see Section 2.3), SMEs in 'Energy – renewables' stand out with 86% saying that they rely on their **own technical expertise** in their efforts to produce green products or services; this time joined by SMEs in 'Construction' (65% 'own technical expertise' vs 56% 'own financial resources').

Across all ecosystems, a comparatively lower share rely on **external support** for the production of their green products or services (e.g. 26% in 'Cultural and creative industries' and 'Retail' and 21% in 'Construction').

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/ No answer
Aerospace and defence	30	71	14	2	11
Agri-food	74	73	23	0	0
Construction	56	65	21	2	7
Cultural and creative industries	67	57	26	0	5
Digital	67	64	23	0	2
Electronics	43	53	54	0	1
Energy - renewables	72	86	31	0	0
Energy intensive industries	92	46	16	2	0
Health	93	27	3	1	0
Mobility - Transport - Automotive	59	56	30	2	4
Proximity, social economy and civil security	63	49	32	3	3
Retail	52	50	26	2	11
Textile	50	40	18	0	29
Tourism	79	49	21	0	2

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each ecosystem is shown in dark green and white font.

(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

Business demographics

Although large companies are more likely than SMEs to rely on each of the three types of support for the production of their green products and services, among **SMEs of different sizes**, the differences are much smaller. For example, among micro companies, 25% say they rely on external support, while among medium-sized companies, this figure is 31%.

Due to the smaller number of SMEs having a green offer, most of the differences in types of support used across different types of SMEs do no reach statistical significance. Nonetheless, there are some significant differences by **sector of activity**. For the production of green products and services, SMEs in manufacturing (67%) and services (65%) are more likely to rely on their own technical expertise than SMEs in industry and retail (both 55%). SMEs in retail are the least likely to rely on their own technical expertise (47% vs 60%-68% in the other sectors).

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27 (SMEs)	60	57	25	2	6
Company size					
Micro (<10 empl.)	60	57	25	2	6
Small (10-49 empl.)	63	59	28	4	4
Medium-sized (50-249 empl.)	65	60	31	5	6
Large (250-499 empl.)	68	68	26	2	3
Large (500+ empl.)	73	72	32	1	7
Company turnover (2023)					
Up to €100 000	66	55	24	2	7
€100 001-€500 000	55	60	22	2	5
€500 001-€2 000 000	65	56	24	2	5
€2 000 001-€10 000 000	63	58	30	1	5
More than €10 000 000	48	60	30	0	2
Company growth					
Gazelles	70	62	31	1	10
High-growth companies	57	63	25	2	4
Weak/no-growth companies	61	54	25	2	6
Negative-growth companies	59	65	26	1	9
Sector of activity (NACE)					
Manufacturing (C)	67	68	24	2	4
Industry (B/D/E/F)	55	62	19	2	8
Retail (G)	55	47	28	2	10
Services (H/I/J/K/L/M)	65	60	26	1	3
Selling products/services					
Products	59	51	27	2	10
Services	62	59	25	2	4
Both	59	59	24	2	6

(%, EU27) Base: n=4 280 (SMEs) & n=397 (Large companies) – **Companies offering green products or services**

Results by EU Member State

In 18 Member States, SMEs are most likely to say they rely on their **own financial resources** for the production of green products or services. The proportion selecting this response is overall the highest in Romania and Slovakia (both 84%), followed by Lithuania (81%) and Estonia (77%). In Denmark and Bulgaria, less than half of respondents rely on their own financial resources (43% and 49%, respectively).

In the remaining nine Member States, SMEs are more likely to say they rely on their **own technical expertise** for the production of green products or services than on their own financial resources. In Slovenia, 82% of SMEs offering green products and services say they rely on their own technical expertise. This figure is 74% in Slovakia, and 72% in both Italy and Lithuania.

On average, among SMEs offering green products or services, 24% say they rely on **external support** for the production of these products or services. At the individual country level, Austria stands out with 44% of SMEs saying this, followed by Spain (40%) and Belgium (38%). The lowest proportion of SMEs relying on external support for the production of their green products or services is seen in Poland (7%).

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	60	57	25	2	6
BE	65	55	38	1	13
BG	49	48	28	10	6
CZ	65	70	25	5	2
DK	43	50	33	7	10
DE	59	70	17	3	11
EE	77	67	14	4	3
IE	60	28	33	1	3
EL	68	54	25	0	2
ES	63	55	40	4	2
FR	51	42	23	0	7
HR	72	38	9	2	10
IT	58	72	27	0	1
CY	63	37	27	8	4
LV	63	45	8	1	9
LT	81	72	28	1	0
LU	53	45	17	2	12
HU	55	62	12	5	9
MT	63	48	15	11	9
NL	65	53	26	1	4
AT	67	69	44	0	5
PL	53	58	7	3	17
PT	56	41	11	0	15
RO	84	41	16	1	4
SI	70	82	27	1	2
SK	84	74	20	1	2
FI	60	51	30	1	4
SE	58	60	33	1	9

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

Non-EU countries

There is also **a large variation across the non-EU countries** in the proportion of SMEs offering green products or services and **relying on external support** for the production of these products and services; from 7% in Türkiye to 54% in Montenegro (although due to smaller number of interviews in this country, this figure should be interpreted with caution). The figure relying on external support in the US (36%) is higher than, on average, for EU SMEs (25%).

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	60	57	25	2	6
UK	51	51	36	4	10
IS	45	49	16	9	15
NO	63	48	22	3	7
CH	63	58	33	2	6
ME	46	27	54	0	0
MD	80	18	21	0	2
MK	70	34	17	1	5
AL	73	16	14	0	0
RS	70	40	18	3	3
TR	75	43	7	0	0
US	62	41	36	1	8

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, non-EU countries) Base: n=1 293 (SMEs) – **Companies offering green products or services**

Types of external support used by SMEs to be more resource efficient

SMEs relying on external support for the production of green products or services were asked for more details about the type of external support they receive; they were presented with a list of seven types of support.

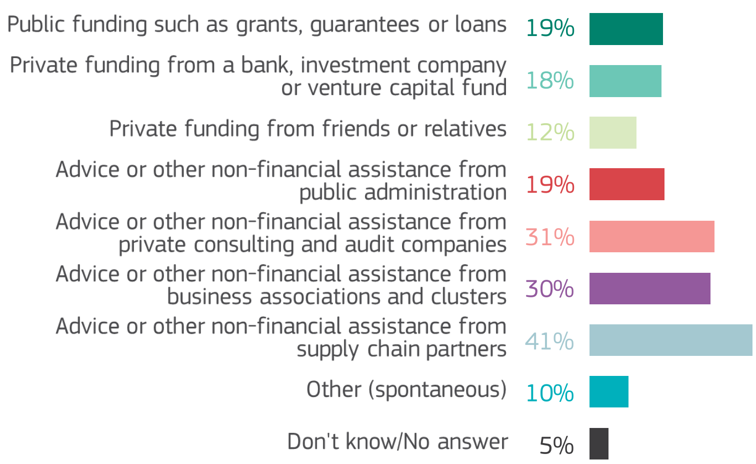
About one in five SMEs (19%) relying on external support for the production of green products or services say they receive **public funding**, such as grants, guarantees or loans. A similar share (18%) report to receive **private funding** from a bank, investment company or venture capital fund, and just over one in ten (12%) receive private funding from friends and relatives.

The largest share (41%) of SMEs relying on external support for the production of green products or services receive **advice or other non-financial assistance** from supply chain partners, followed by 30% mentioning this type of support from business associations and clusters, and 31% from private consulting and audit companies. About one in five SMEs (19%) receive advice or other non-financial assistance from public administration.

Due to the smaller base size for this question, results are not discussed in more depth.

DX1 Which type of external support does your company get for the production of its green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=1 155 (SMEs) – **Companies relying on external support for the production of their green products or services**

4.2. Support to expand green offer

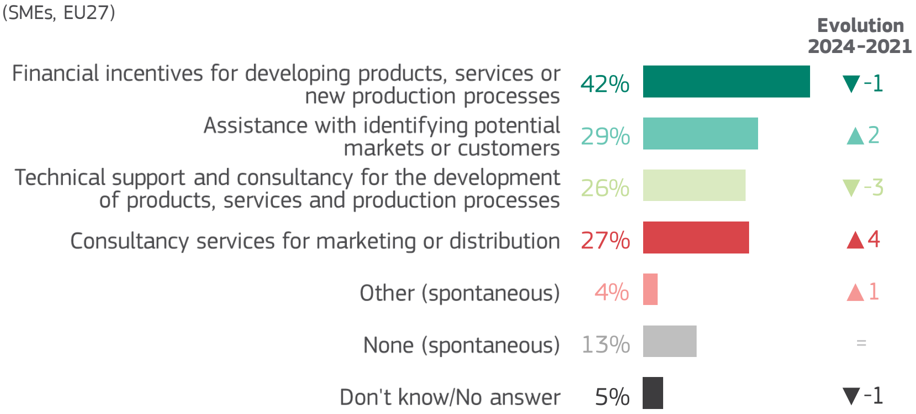
SMEs that sell green products or services were asked what kind of support would help them the most to expand their green offer.

Over four in ten (42%) of these SMEs say that **financial incentives for developing products, services or new production processes** would help them the most. Financial incentives are much more likely to be mentioned than assistance with identifying potential markets or customers (29%), technical support or consultancy for the development of new products, services or production processes (26%) and consultancy for marketing or distribution (27%). Nonetheless, **compared to 2021,** there are now slightly more SMEs saying that consultancy for marketing or distribution would help them to expand their green offer (+4 pp).

Over one in ten SMEs (13%) answer that **none of the types of support listed in the survey** would help them to expand their range of green products or services.

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

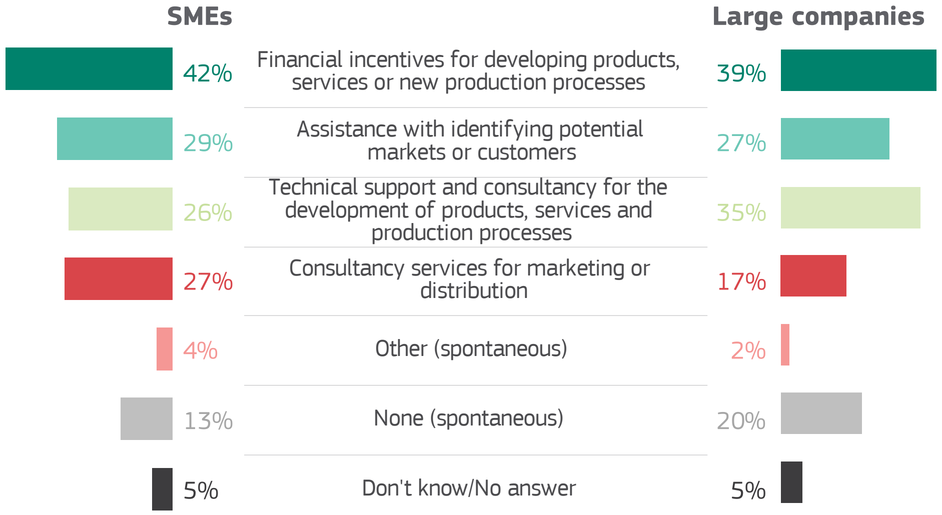
SMEs vs large companies

Both **among SMEs and large companies**, the largest share of respondents reply that **financial incentives for developing products, services or new production processes** would help their company the most to expand their offer of green products or services (42% and 39%, respectively).

Compared to large companies, SMEs are more likely to reply that consultancy services for marketing and distribution would help them (27% vs 17%). Large companies, on the other hand, are more likely than SMEs to mention technical support and consultancy for the development of products, services and production processes (35% vs 26%).

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(SMEs vs large companies, EU27)



(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

Results by ecosystem

In line with the EU average results, **in most ecosystems, the largest share of SMEs with a green offer reply that financial incentives for developing products, services or new production processes would help them the most to expand their offer**. For example, this view is shared by 55% of SMEs with a green offer in 'Agri-food' and 60% in 'Energy – renewables'.

The table below also shows some variation in the preferences for different types of support by ecosystem; however, due to the small number of SMEs with a green offer in various ecosystems, caution should be exercised when interpreting these differences.

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Consultancy services for marketing or distribution	Technical support and consultancy for the development of products, services and production processes	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	26	28	39	16	30	5	0
Agri-food	55	17	26	29	0	20	1
Construction	39	28	25	31	5	12	4
Cultural and creative industries	36	28	18	28	3	18	5
Digital	37	39	30	23	3	14	1
Electronics	37	49	53	22	1	9	0
Energy - renewables	60	32	19	21	7	7	5
Energy intensive industries	78	4	8	16	29	10	3
Health	11	36	76	13	0	4	0
Mobility - Transport - Automotive	54	38	28	15	3	9	2
Proximity, social economy and civil security	53	33	26	29	0	7	10
Retail	32	31	28	20	3	19	5
Textile	42	34	35	45	0	2	6
Tourism	46	16	26	36	2	9	8

Note: The higher the proportion selecting a response, the darker the green/red the cell. The highest-ranking type of support for each ecosystem is shown in dark green and white font.

(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

Business demographics

Across all types of SMEs, the largest share think that **financial incentives for developing products, services or new production processes** would help their company the most to expand their offer of green products or services (between 38% and 47%).

Due to the smaller number of SMEs having a green offer, most of the differences in preferences for various types of support across different categories of SMEs do no reach statistical significance.

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Consultancy services for marketing or distribution	Technical support and consultancy for the development of products, services and production processes	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	42	29	27	26	4	13	5
Company size							
Micro (<10 empl.)	41	29	27	25	4	13	5
Small (10-49 empl.)	47	29	20	29	3	13	4
Medium-sized (50-249 empl.)	46	26	23	28	1	18	3
Large (250-499 empl.)	37	25	18	27	2	22	7
Large (500+ empl.)	42	29	14	45	3	18	4
Company turnover (2023)							
Up to €100 000	39	29	25	26	6	12	3
€100 001-€500 000	42	32	27	28	2	15	3
€500 001-€2 000 000	41	28	30	30	3	14	5
€2 000 001-€10 000 000	45	34	26	26	1	9	4
More than €10 000 000	46	15	20	14	6	12	18
Company growth							
Gazelles	43	40	33	33	0	8	1
High-growth companies	46	34	26	26	3	13	3
Weak/no-growth companies	41	25	26	26	4	14	6
Negative-growth companies	41	37	30	18	3	10	1
Sector of activity (NACE)							
Manufacturing (C)	47	24	32	36	2	11	3
Industry (B/D/E/F)	42	30	22	29	6	11	4
Retail (G)	38	33	26	21	2	17	5
Services (H/I/J/K/L/M)	44	26	28	25	4	12	6
Selling products/services							
Products	40	29	25	22	3	16	4
Services	40	24	25	29	4	13	8
Both	44	33	28	24	4	12	3

(%, EU27) Base: n=4 280 (SMEs) & n=397 (Large companies) – **Companies offering green products or services**

Results by EU Member State

In line with the EU average results, in 22 Member States, the largest share of SMEs selling green products or services say that **financial incentives for developing products, services or new production processes** would help their SME the most to expand their offer. In four Member States, at least 60% of respondents think that financial incentives would help the most: Lithuania (75%), Greece (71%), Bulgaria (63%) and Croatia (60%).

Between 10% of SMEs in Slovenia and 50% in Cyprus say **assistance with identifying potential markets or customers** would help them the most to expand their offer. Cyprus is joined at the higher end of the country ranking by Spain (41%), Slovakia (38%) and Czechia (37%).

The results for the remaining types of support are similar to those for assistance with identifying potential markets or customers. In Sweden, 43% of respondents say that **technical support and consultancy for the development of products, services and production processes** would help them the most. In the countries at the bottom of the country ranking, less than one in five respondents share this view. Between 13% of SMEs in Ireland and 39% in Malta and Romania answer that **consultancy services for marketing or distribution** would help them the most to launch additional green products or services.

SMEs selling green products or services in Belgium (24%) and the Netherlands (22%) are the most likely to say that **none of the types of support** listed in the survey would help them to expand their offer. In eight countries, less than one in ten respondents say the same (e.g. 3% in Ireland and 7% in Greece). As noted earlier in this report, there are two possible reasons for SMEs to reply that none of the types of support listed in the survey would help them: (1) they find the types of support listed in the survey not adequate, or (2) the SMEs are not looking for/do not see a need for support.

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	42	29	26	27	4	13	5
BE	33	34	35	29	2	24	1
BG	63	14	21	31	6	6	4
CZ	36	37	30	34	2	10	2
DK	41	25	25	17	5	13	9
DE	38	26	23	27	7	19	4
EE	44	28	32	22	2	17	1
IE	52	32	30	13	1	3	12
EL	71	34	24	27	1	7	0
ES	52	41	32	30	2	8	0
FR	35	32	26	27	2	15	5
HR	60	18	33	17	0	13	1
IT	42	18	16	29	6	8	12
CY	42	50	29	37	0	6	0
LV	46	12	17	22	7	13	5
LT	75	18	30	36	0	9	0
LU	27	31	20	36	6	12	9
HU	44	19	35	17	0	15	0
MT	47	14	26	39	8	16	2
NL	33	23	18	26	5	22	6
AT	41	32	39	21	0	11	5
PL	37	30	23	19	4	16	10
PT	31	24	21	29	4	11	0
RO	50	28	35	39	0	6	0
SI	54	10	27	16	1	15	0
SK	46	38	29	25	0	12	1
FI	47	24	33	25	4	12	1
SE	39	30	43	14	3	12	4

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, EU27) Base: n=4 280 (SMEs) – **Companies offering green products or services**

Non-EU countries

In most of the **non-EU countries**, the largest share of SMEs selling green products or services say that **financial incentives for developing products, services or new production processes** would help their SME the most to expand their offer (between 33% in the UK and 71% in Albania). In **the UK**, a somewhat larger share of SMEs with a green offer say that **none of the types of support** listed in the survey would help them to expand their offer (24% vs 3% to 19% in the other non-EU countries)..

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	42	29	26	27	4	13	5
UK	33	34	35	29	2	24	1
IS	63	14	21	31	6	6	4
NO	36	37	30	34	2	10	2
CH	41	25	25	17	5	13	9
ME	38	26	23	27	7	19	4
MD	44	28	32	22	2	17	1
MK	52	32	30	13	1	3	12
AL	71	34	24	27	1	7	0
RS	52	41	32	30	2	8	0
TR	35	32	26	27	2	15	5
US	60	18	33	17	0	13	1

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, non-EU countries) Base: n=1 293 (SMEs) – **Companies offering green products or services**

4.3. Support to launch green offer

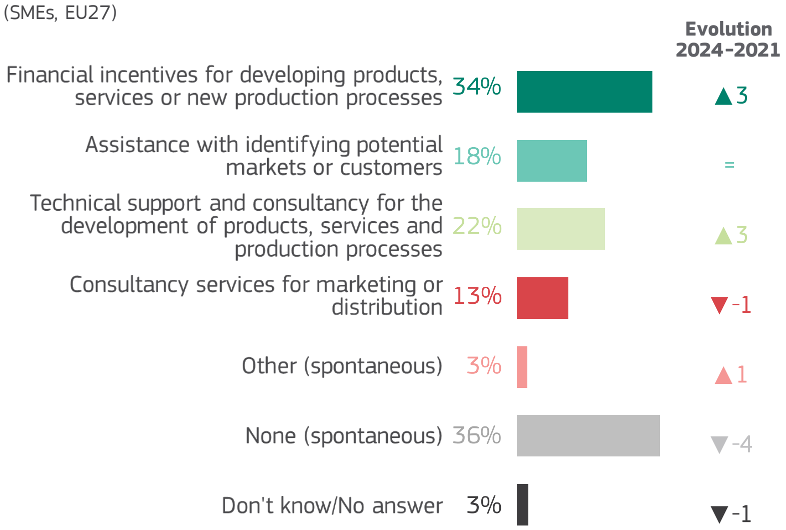
SMEs not currently offering green products or services were asked what kind of support would help them the most to launch a range of green products or services. They were presented with the same list of support measures as for SMEs already offering green products or services (see previous section).

Among SMEs not currently offering green products or services, **financial incentives for developing new products, services or production processes** are also the most-mentioned type of support (34%). This measure is followed by technical support and consultancy for developing new products, services or production processes (22%) and assistance with identifying potential customers or markets (18%). The last type of support – consultancy services for marketing or distribution – is selected by 13%.

While 13% of SMEs currently offering green products or services reply that none of the types of support would help them to expand their offer (see previous section), among SMEs not offering green products or services, nearly three times as many respondents (36%) reply that **none of the support measures would help them to launch a range of green products or services**.

DX4 What type of support would help you the most to launch your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)



(%, EU27) Base: n=8 307 (SMEs) – **Companies not offering green products or services**

Results by ecosystem

In line with the results for support to expand green offer, across most ecosystems, the largest share of SMEs not yet having a green offer say that **financial incentives for developing products, services or new production processes would help the most** to launch such an offer. This response is selected, for example, by 41% of SMEs without a green offer in 'Mobility – Transport – Automotive' and by 29% in 'Proximity, social economy and civil security'.

SMEs in **'Health'** (41%) are more likely than their counterparts in other ecosystems to say that assistance with identifying potential markets or customers would be needed to launch a range of green products or services and SMEs in **'Electronics'** (47%) are more likely to refer to Technical support and consultancy for the development of products, services and production processes.

The share of SMEs saying that **none of the support measures** would help them to launch a range of green products or services varies between 15% in 'Health' and 43% in 'Aerospace and defence'.

DX4 What type of support would help you the most to launch your range of green products or services? [MULTIPLE ANSWERS]

(Ecosystems, SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
Aerospace and defence	23	16	28	6	6	43	0
Agri-food	36	13	35	23	0	26	1
Construction	37	17	23	11	1	38	1
Cultural and creative industries	42	18	22	12	2	38	2
Digital	32	18	22	8	3	34	4
Electronics	42	20	47	9	1	17	5
Energy - renewables	29	24	15	16	6	34	3
Energy intensive industries	38	24	16	11	8	28	10
Health	23	41	23	35	3	15	5
Mobility - Transport - Automotive	41	13	24	10	3	34	4
Proximity, social economy and civil security	29	23	24	13	2	36	2
Retail	32	19	19	17	4	35	2
Textile	40	24	24	21	1	20	8
Tourism	37	14	25	18	5	25	6

Note: The higher the proportion selecting a response, the darker the green/red the cell. The highest-ranking type of support for each ecosystem is shown in dark green and white font.

(%, EU27) Base: n=8 307 (SMEs) – **Companies not offering green products or services**

Business demographics

Most differences by type of SMEs in preference for various types of support do not reach statistical significance; for example, no notable differences are observed between **SMEs and large companies**. It is, however, worth pointing out that especially **gazelles** are more likely to think that assistance with identifying potential markets or customers (22%) and technical support and consultancy for the development of products, services and production processes (27%) would help the most to launch a range of green products or services.

DX4 What type of support would help you the most to launch your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27 (SMEs)	34	18	22	13	3	36	3
Company size							
Micro (<10 empl.)	34	17	22	13	3	36	3
Small (10-49 empl.)	36	20	24	14	3	33	4
Medium-sized (50-249 empl.)	36	21	23	14	4	32	4
Large (250-499 empl.)	41	17	21	12	1	33	5
Large (500+ empl.)	35	26	37	9	1	33	0
Company turnover (2023)							
Up to €100 000	37	22	27	13	1	31	2
€100 001-€500 000	33	18	23	14	2	34	4
€500 001-€2 000 000	36	16	19	13	3	40	2
€2 000 001-€10 000 000	31	12	16	11	6	45	3
More than €10 000 000	36	16	29	13	0	40	1
Company growth							
Gazelles	44	26	28	23	1	25	1
High-growth companies	39	19	26	17	3	31	1
Weak/no-growth companies	33	17	21	11	3	38	3
Negative-growth companies	34	15	19	18	3	36	3
Sector of activity (NACE)							
Manufacturing (C)	36	18	24	15	2	32	4
Industry (B/D/E/F)	37	17	23	11	2	36	1
Retail (G)	35	19	19	16	5	35	2
Services (H/I/J/K/L/M)	33	17	23	12	2	37	4
Selling products/services							
Products	35	19	22	18	4	32	2
Services	34	16	22	11	2	38	3
Both	35	19	23	13	3	34	3

(%, EU27) Base: n=8 307 (SMEs) & n=458 (Large companies) – **Companies not offering green products or services**

Results by EU Member State

In most Member States, the largest share of SMEs currently not selling green products or services say that **financial incentives for developing products, services or new production processes** would help their SME the most to launch their own range of green products or services. This proportion is the highest in Lithuania (60%), followed by Greece (55%).

In Romania, 31% of SMEs currently not selling green products or services say **assistance with identifying potential markets or customers** would help them the most to launch their own green products or services; in Ireland, Spain, Slovakia and Sweden, just over a quarter (27%-28%) mention this type of support.

Between 9% of SMEs in Latvia and 40% in Spain say that **technical support and consultancy for the development of products, services and production processes** would help them the most to launch their own green products or services. Similarly, between 4% of SMEs in Italy and 32% in Austria answer that **consultancy services for marketing or distribution** would help them the most.

In ten Member States, more than 40% of SMEs currently not selling green products or services say that **none of the support measures listed in the survey would help them** to launch a green offer (from 41% in Cyprus to 64% in Malta).

DX4 What type of support would help you the most to launch your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, EU27)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	34	18	22	13	3	36	3
BE	22	21	22	17	0	46	1
BG	43	18	23	19	2	29	3
CZ	28	20	21	17	0	40	1
DK	13	15	23	12	2	48	8
DE	33	21	16	13	4	42	1
EE	33	18	23	16	2	29	2
IE	43	28	22	21	1	17	3
EL	55	21	27	15	1	25	0
ES	39	27	40	16	3	19	4
FR	27	18	28	13	2	25	7
HR	47	9	20	9	1	30	5
IT	34	5	12	4	7	53	2
CY	38	14	22	16	0	41	2
LV	32	9	9	13	1	44	5
LT	60	16	24	22	0	27	0
LU	18	15	16	11	3	53	1
HU	33	9	15	5	1	52	2
MT	11	0	10	12	4	64	12
NL	11	18	23	16	0	47	6
AT	39	18	22	32	2	23	4
PL	44	14	21	10	0	39	3
PT	26	22	20	18	8	23	4
RO	48	31	32	23	1	14	2
SI	41	13	14	10	6	37	2
SK	38	27	21	21	0	27	1
FI	33	23	18	12	1	34	2
SE	34	27	18	12	1	32	6

Note: The higher the proportion selecting a response, the darker green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, EU27) Base: n=8 307 (SMEs) – **Companies not offering green products or services**

Non-EU countries

In all but one of the **non-EU countries**, the largest share of SMEs currently not selling green products or services say that **financial incentives for developing products, services or new production processes would help their SME the most** to launch their own range of green products or services. This proportion varies between 19% in Albania and 50% in Montenegro. In **the US**, the proportion selecting this type of support is the same as, on average, in the EU (33%-34%).

As for the EU average results, in five non-EU countries, the largest share of SMEs reply that none of the types of support listed in the survey would help them to launch a range of green products or services (e.g. 46% in Albania and 42% in Switzerland).

DX4 What type of support would help you the most to launch your range of green products or services? [MULTIPLE ANSWERS]

(SMEs, non-EU countries)

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	34	18	22	13	3	36	3
UK	44	23	20	18	2	30	3
IS	46	17	15	18	0	27	11
NO	38	17	28	12	4	26	4
CH	28	16	24	13	1	42	10
ME	50	15	30	14	0	14	1
MD	11	13	19	20	11	45	0
MK	31	9	15	16	4	39	5
AL	19	13	10	11	0	46	13
RS	47	26	17	6	0	25	4
TR	34	25	24	14	0	31	3
US	33	19	19	13	0	40	3

Note: The higher the proportion selecting a response, the darker the green the cell. The highest-ranking type of support for each country is shown in dark red and white font.

(%, non-EU countries) Base: n=2 300 (SMEs) – **Companies not offering green products or services**

5. Green jobs

At the end of the survey, respondents were asked if there are any full-time employees in their SME working in green jobs. In the context of the survey, a **'green job'** was defined as one that **directly deals with information, technologies, or materials that preserve or restore environmental quality**. This type of job would require specialised skills, knowledge, training or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services). As such, the total amount of green jobs measured by this Eurobarometer survey is **linked both to resource-efficiency processes and to the production of green products and services, as well as to compliance with environmental legislation**. Examples include a chemical technician testing air samples for pollution emission levels of the production process, a worker contributing to the production of machinery that reduces pollution emissions, or an operator of renewable energy equipment to produce electricity for use within the company.

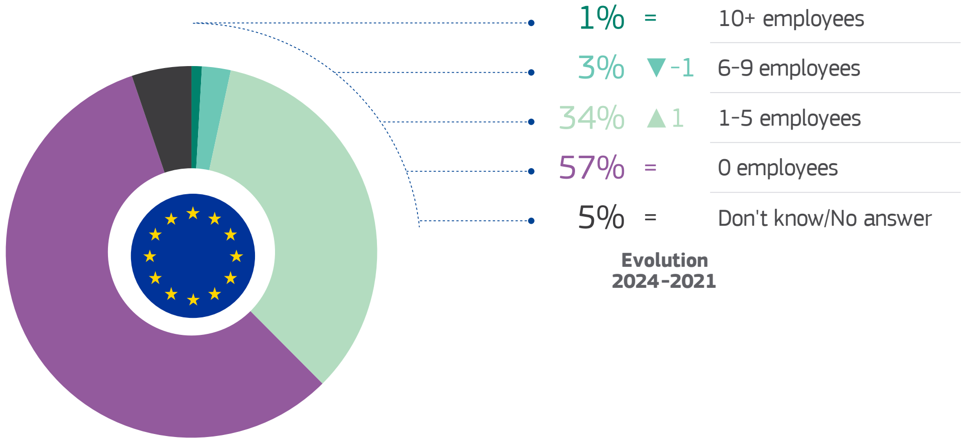
As shown in the chart below, just under four in ten SMEs have **at least one full-time employee working in a green job some or all of the time**: 34% say there are between one and five 'green' employees in their SME and 4% report that their number is higher than five. These shares are **unchanged compared to 2021**.

SMEs vs large companies

Large companies are more likely than SMEs to have multiple employees working in a green job: 26% say there are between one and five 'green' employees in their company and another 26% report that their number is higher than five.

DX5 In your company, how many of your full -time employees, including yourself, work in green jobs some or all of the time?

(SMEs, EU27)



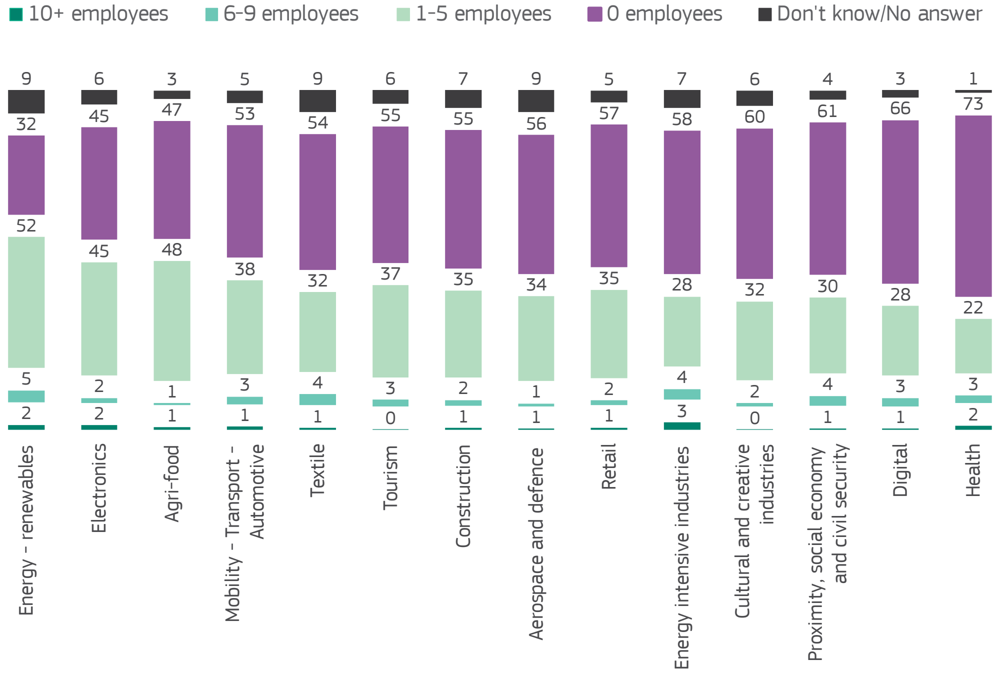
(%, EU27) Base: n=13 124 (SMEs)

Results by ecosystem

There are also differences across the industrial ecosystems in the proportion of SMEs with **at least one full-time employee working in a green job some or all of the time**. The proportion of SMEs with one or more 'green' employees varies between 27% in 'Health' and 59% in **'Energy – renewables'**. In the latter ecosystem, 52% say there are between one and five 'green' employees in their company and another 7% report that their number is higher than five.

DX5 In your company, how many of your full -time employees, including yourself, work in green jobs some or all of the time?

(Ecosystems, SMEs, EU27)



Ecosystem	10+ employees	6-9 employees	1-5 employees	0 employees	Don't know/No answer
Energy - renewables	2	5	52	32	9
Electronics	2	2	45	45	6
Agri-food	1	1	48	47	3
Mobility - Transport - Automotive	1	3	38	53	5
Textile	1	4	32	54	9
Tourism	0	3	37	55	6
Construction	1	2	35	55	7
Aerospace and defence	1	1	34	56	9
Retail	1	2	35	57	5
Energy intensive industries	3	4	28	58	7
Cultural and creative industries	0	2	32	60	6
Proximity, social economy and civil security	1	4	30	61	4
Digital	1	3	28	66	3
Health	2	3	22	73	1

(%, EU27) Base: n=13 124 (SMEs)

Business demographics

The **largest SMEs** (with between 50 and 249 employees) are the most likely to have at least one full-time employee working in a green job some or all of the time (49% vs 37% for micro companies). Among SMEs with an **annual turnover** exceeding €500 000, more than 40% have at least one green employee; the proportion is somewhat lower for SMEs with lower turnover values (37%).

High-growth SMEs (42%) and **gazelles** (41%) are also more likely to have at least one full-time employee working in a green job some or all of the time (compared to 37% of weak/no-growth SMEs and 36% of negative-growth SMEs).

SMEs in the **services sector** are overall the least likely to have at least one green employee (36%); in the other activity sectors, this figures varies between 39% and 42%. Finally, SMEs **selling products and services** (40%) are somewhat more likely than those selling only products or only services (36%-37%) to have an employee in a green job.

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time?

(SMEs, EU27)

	10+ employees	6-9 employees	1-5 employees	0 employees	Don't know/No answer
EU27 (SMEs)	1	3	34	57	5
Company size					
Micro (<10 empl.)	0	3	35	58	5
Small (10-49 empl.)	12	3	26	53	6
Medium-sized (50-249 empl.)	18	3	28	42	9
Large (250-499 empl.)	13	2	33	34	18
Large (500+ empl.)	43	1	16	15	25
Company turnover (2023)					
Up to €100 000	0	2	35	59	4
€100 001-€500 000	0	3	34	58	5
€500 001-€2 000 000	1	4	36	54	6
€2 000 001-€10 000 000	3	3	34	55	5
More than €10 000 000	2	1	40	51	6
Company growth					
Gazelles	2	4	35	58	1
High-growth companies	2	5	35	53	5
Weak/no-growth companies	1	2	34	58	6
Negative-growth companies	1	1	34	60	5
Sector of activity (NACE)					
Manufacturing (C)	1	3	37	53	6
Industry (B/D/E/F)	1	3	36	54	7
Retail (G)	1	2	36	56	5
Services (H/I/J/K/L/M)	1	3	32	60	5
Selling products/services					
Products	1	2	32	59	6
Services	1	2	34	58	5
Both	1	3	36	55	5

(%, EU27) Base: n=13 124 (SMEs) & n=917 (Large companies)

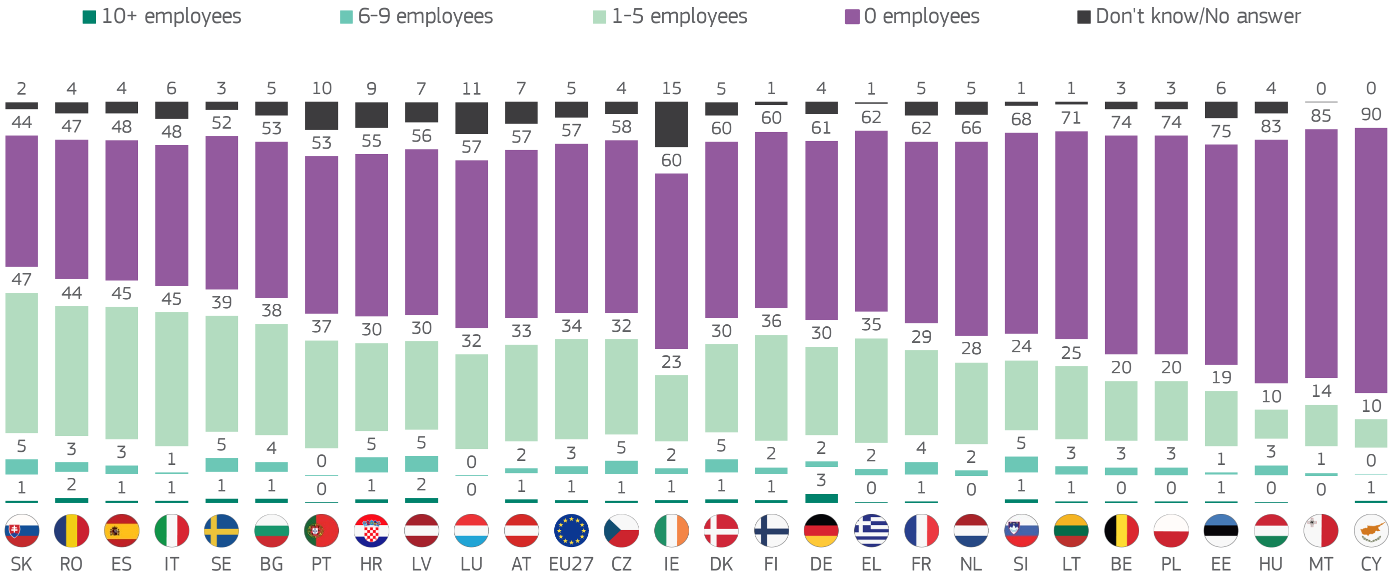
Results by EU Member State

The proportion of SMEs with **at least one employee in a green job (some or all the time)** ranges from 10% in Cyprus to 53% in Slovakia.[17] In Italy, Spain and Romania, close to half of SMEs (47%-49%) have at least one 'green' employee. Other countries at the lower end of the country ranking are Malta (15%) and Hungary (14%).

In seven Member States, 5% of SMEs report to have **between six and nine employees in green jobs**: Croatia, Czechia, Denmark, Latvia, Slovakia, Slovenia and Sweden.

DX5 In your company, how many of your full -time employees, including yourself, work in green jobs some or all of the time?

(SMEs, EU27)



(%, EU27) Base: n=13 124 (SMEs)

[17] Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

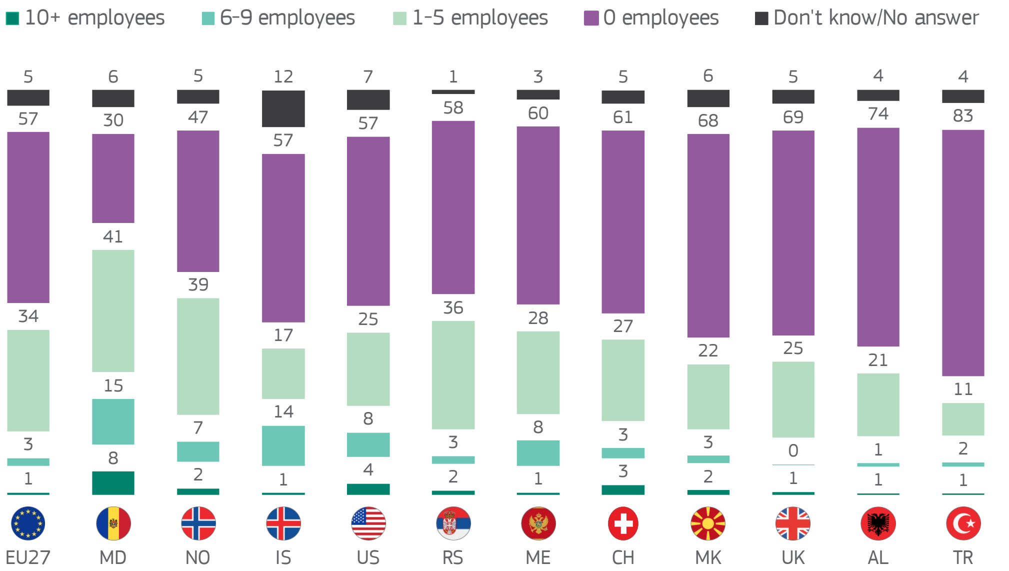
Non-EU countries

SMEs in the US are as likely as SMEs in the EU to have at least one employee working in a green job (37% vs 38%); nonetheless, SMEs in the US are somewhat more likely to report having between six and nine employees in green jobs (8% vs 3%).

Among the remaining **non-EU countries**, the proportion of SMEs with at least one employee in a green job varies between 13% in Türkiye and 48% in Norway, and then further increases to 64% in Moldova (although due to smaller number of interviews in this country, this figure should be interpreted with caution).

DX5 In your company, how many of your full -time employees, including yourself, work in green jobs some or all of the time?

(SMEs, non-EU countries)



(%, non-EU countries) Base: n=3 783 (SMEs)

Trend compared to 2021

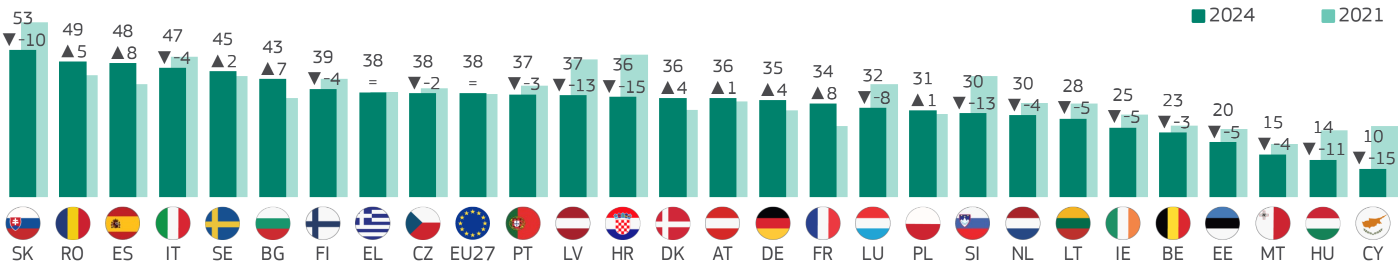
Although the average proportion of SMEs across the EU with at least one full-time employee working in a green job has remained stable, **in a number of Member States, SMEs are now less likely than in 2021 to report having at least one green employee**. The largest decreases in this figure are seen in Croatia (-15 pp, to 36%), Cyprus (-15 pp, to 10%), Latvia (-13 pp, to 37%) and Slovenia (-13 pp, to 30%).

On the other hand, the share of SMEs with at least one full-time employee working in a green job has **increased by more than five percentage points** in Spain (+8 pp, to 48%), France (+8 pp, to 34%) and Bulgaria (+7 pp, to 43%).

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time?

(SMEs, EU27)

% At least one employee



(%, EU27) Base: n=13 124 (SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November -December 2021)

A note about by industrial ecosystems

In 2020, the European Commission presented its industrial strategy.[18] The strategy is supported by a focus on industrial ecosystems, taking into account all players within a value chain. So far, 14 industrial ecosystems have been identified based on their economic and technological relevance, and for their expected contribution to the decarbonisation, digitalisation and resilience of the EU economy. These 14 industrial ecosystems are:

- Aerospace and Defence (n=188)
- Agri-food (n=406)
- Construction (n=2 976)
- Cultural and Creative Industries (n=606)
- Digital (n=586)
- Electronics (n=236)
- Energy Intensive Industries (n=286)
- Energy-Renewables (n=436)
- Health (n=109)
- Mobility-Transport-Automotive (n=1 594)
- Proximity, Social Economy and Civil Security (n=834)
- Retail (n=3 221)
- Textile (n=234)
- Tourism (n=640)

In this survey, respondents were presented with a list of industrial ecosystems and were asked which one best describes their SMEs; the values in brackets in the list of industrial ecosystems presented above are the number of SMEs surveyed selecting each of the industrial ecosystems. Respondents were only presented with the industrial ecosystems that match with their sector of activity (NACE 1-digit sectors, from B to M). Some respondents found it difficult to select one of the industrial ecosystems and said they 'did not know' or that none of the descriptions were applicable. Given that, for each industrial ecosystem, the European Commission has identified core activities, i.e. those that more than the others characterise each industrial ecosystem, and these activities have been mapped against the NACE classification, a post-data collection coding was applied for those SMEs that could not select their industrial ecosystem using information from the detailed 2-digit NACE sector information of each SME from the sample frame.

[18] Communication from the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. **A New Industrial Strategy for Europe**, COM/2020/102 final (https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52020DC0102)

Technical specifications

Between 3 and 28 June 2024, Ipsos European Public Affairs carried out the Flash Eurobarometer 549 at the request of the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. It is a company survey coordinated by the Directorate-General for Communication, "Media monitoring and Eurobarometer" Unit.

This Flash Eurobarometer survey covers Small and Medium-Sized enterprises in the Manufacturing (NACE category C), Industry (NACE categories B/D/E/F), Retail (NACE category G) and Services (NACE categories H/I/J/K/L/M) in each of the 27 EU Member States and in ten non-EU countries (Iceland, Norway, Switzerland, the United Kingdom, Montenegro, Moldova, North Macedonia, Albania, Serbia, Türkiye and the United States). Interviews took place with someone with decision-making responsibilities (managing director, general manager, CEO, financial director), someone leading the commercial activities (commercial manager, sales manager, marketing manager) or a legal officer. All interviews were carried via Computer-Assisted Telephone Interviewing (CATI).

Margin of error

Survey results are subject to sampling tolerances. The 'margin of error' quantifies uncertainty about (or confidence in) a survey result. As a rule, the more interviews conducted (sample size), the smaller the margin of error. A sample of 500 will produce a margin of error of not more than 4.4 percentage points.

Statistical margins due to sampling tolerances
(at the 95% level of confidence)

various sample sizes are in rows various observed results are in columns

	5%	10%	25%	50%	75%	90%	95%
n=50	±6.0	±8.3	±12.0	±13.9	±12.0	±8.3	±6.0
n=100	±4.3	±5.9	±8.5	±9.8	±8.5	±5.9	±4.3
n=200	±3.0	±4.2	±6.0	±6.9	±6.0	±4.2	±3.0
n=500	±1.9	±2.6	±3.8	±4.4	±3.8	±2.6	±1.9
n=1000	±1.4	±1.9	±2.7	±3.1	±2.7	±1.9	±1.4
n=1500	±1.1	±1.5	±2.2	±2.5	±2.2	±1.5	±1.1
n=2000	±1.0	±1.3	±1.9	±2.2	±1.9	±1.3	±1.0

EU Member States

	Number of interviews (SMEs/large)	Fieldwork dates		Universe of SMEs (absolute number)[1]	% of EU27 universe
		Start	*End*		
EU27	13 124 / 917[(2)]	3 June 2024	28 June 2021	24 170 456	100%
BE	543 / 59	3 June 2024	24 June 2024	683 181	2.83%
BG	475 / 26	3 June 2024	25 June 2024	334 331	1.38%
CZ	544 / 54	3 June 2024	20 June 2024	1 091 467	4.52%
DK	442 / 61	3 June 2024	25 June 2024	234 398	0.97%
DE	571 / 30	3 June 2024	20 June 2024	2 409 321	9.97%
EE	497 / 8	3 June 2024	20 June 2024	110 142	0.46%
IE	476 / 28	4 June 2024	21 June 2024	294 036	1.22%
EL	566 / 34	3 June 2024	20 June 2024	748 848	3.10%
ES	566 / 34	3 June 2024	21 June 2024	2 539 891	10.51%
FR	544 / 57	3 June 2024	20 June 2024	3 357 614	13.89%
HR	493 / 17	3 June 2024	25 June 2024	183 463	0.76%
IT	545 / 55	3 June 2024	21 June 2024	3 680 602	15.23%
CY	248 / 4	3 June 2024	21 June 2024	63 925	0.26%
LV	502 / 10	3 June 2024	20 June 2024	102 366	0.42%
LT	488 / 14	3 June 2024	27 June 2024	251 396	1.04%
LU	250 / 3	3 June 2024	21 June 2024	34 816	0.14%
HU	468 / 36	3 June 2024	21 June 2024	724 935	3.00%
MT	249 / 3	3 June 2024	21 June 2024	43 655	0.18%
NL	550 / 52	3 June 2024	21 June 2024	1 507 721	6.24%
AT	455 / 50	3 June 2024	21 June 2024	404 498	1.67%
PL	553 / 57	3 June 2024	21 June 2024	2 113 723	8.75%
PT	544 / 59	3 June 2024	21 June 2024	814 302	3.37%
RO	595 / 14	3 June 2024	25 June 2024	815 702	3.37%
SI	459 / 42	3 June 2024	19 June 2024	153 209	0.63%
SK	491 / 10	3 June 2024	25 June 2024	507 885	2.10%
FI	473 / 32	3 June 2024	20 June 2024	331 141	1.37%
SE	537 / 68	3 June 2024	27 June 2024	633 888	2.62%

Notes: (1) Universe calculations based on Eurostat Enterprise Statistics and Business Demography, 2022; (2) 8 EU respondents did not provide information on exact number of employees.

Non-EU countries

	Number of interviews (SMEs/large)	Fieldwork dates	
		Start	*End*
UK	435 / 66	3 June 2024	21 June 2024
IS	246 / 7	3 June 2024	25 June 2024
NO	470 / 30	3 June 2024	27 June 2024
CH	444 / 61	3 June 2024	25 June 2024
ME	94 / 6	3 June 2024	19 June 2024
MD	93 / 6	3 June 2024	28 June 2024
MK	498 / 20	3 June 2024	24 June 2024
AL	105 / 3	3 June 2024	21 June 2024
RS	469 / 32	3 June 2024	25 June 2024
TR	454 / 48	3 June 2024	26 June 2024
US	475 / 37	3 June 2024	28 June 2024

Questionnaire

ASK ALL

Intro_Q1 (READ OUT) I will now ask you a few questions about resource efficiency actions that your company may have undertaken. For the purpose of this survey, resource efficiency means using natural resources in a sustainable and environmentally-friendly manner, and this at different stages, from supply and production to, for example, waste management.

ASK ALL

Q1 What actions is your company undertaking to be more resource efficient?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 9; ITEMS 11 AND 12 ARE EXCLUSIVE)

Saving water	1
Saving energy	2
Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	3
Saving materials	4
Switching to greener suppliers of materials	5
Minimising waste	6
Selling your residues and waste to another company	7
Recycling, by reusing material or waste within the company	8
Designing products that are easier to maintain, repair or reuse	9
Other (DO NOT READ OUT)	10
None (DO NOT READ OUT)	11
Don't know/No answer (DO NOT READ OUT)	12

FL498 - Q1

ASK ALL

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement ?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 9; ITEMS 11 AND 12 ARE EXCLUSIVE)

Save water	1
Save energy	2
Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	3
Save materials	4
Switch to greener suppliers of materials	5
Minimise waste	6
Sell your residues and waste to another company	7
Recycle, by reusing material or waste within the company	8
Designing products that are easier to maintain, repair or reuse	9
Other (DO NOT READ OUT)	10
None (DO NOT READ OUT)	11
Don't know/No answer (DO NOT READ OUT)	12

FL498 - Q2

ASK IF CODE 1 TO 9 IN Q1

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

(READ OUT - ONE ANSWER ONLY)

Significantly decreased	1
Slightly decreased	2
Slightly increased	3
Significantly increased	4
Not changed (DO NOT READ OUT)	5
Don't know/No answer (DO NOT READ OUT)	6

FL498 - Q3

ASK IF CODE 1 TO 9 IN Q1

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

(READ OUT - ONE ANSWER ONLY)

Nothing	1
Less than 1% of annual turnover	2
1- 5% of annual turnover	3
6-10% of annual turnover	4
11-30% of annual turnover	5
More than 30% of annual turnover	6
Don't know/No answer (DO NOT READ OUT)	7

FL498 - Q4

ASK ALL

N1a Does your company use renewable energy sources?

(READ OUT - ONE ANSWER ONLY)

Yes, you purchase energy from a renewable energy supplier	1
Yes, you generate renewable energy onsite (e.g. solar panels, wind power)	2
No	3
Don't know/No answer (DO NOT READ OUT)	4

New

ASK IF CODE 2 IN N1a

N1b What share of energy consumed in your company is generated on-site (e.g. via solar panels, wind power)?

(READ OUT - ONE ANSWER ONLY)

Less than 5%	1
Between 5%-19%	2
Between 20%-49%	3
Between 50%-74%	4
75% and more	5
Don't know/No answer (DO NOT READ OUT)	6

New

ASK IF CODE 1 TO 9 IN Q1

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 3; ITEM 5 IS EXCLUSIVE)

Its own financial resources	1
Its own technical expertise	2
External support	3
Other (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

FL498 - Q5

ASK IF CODE 3 IN Q5

Q6 More precisely, which type of external support is it?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 7; ITEM 9 IS EXCLUSIVE)

Public funding such as grants, guarantees or loans	1
Private funding from a bank, an investment company or venture capital fund	2
Private funding from friends and relatives	3
Advice or other non-financial assistance from public administration	4
Advice or other non-financial assistance from private consulting and audit companies	5
Advice or other non-financial assistance from business associations and clusters (M)	6
Advice or other non-financial assistance from supply chain partners (N)	7
Other (DO NOT READ OUT)	8
Don't know/No answer (DO NOT READ OUT)	9

FL498 - Q6

ASK IF CODE 1 TO 9 IN Q1

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 10; ITEMS 12 AND 13 ARE EXCLUSIVE)

Complexity of administrative or legal procedures	1
Difficulty to adapt environmental legislation to your company	2
Technical requirements of the legislation not being up to date	3
Difficulty in choosing the right resource efficiency actions for your company	4
Cost of environmental actions	5
Lack of specific environmental expertise	6
Lack of supply of required materials, parts, products or services	7
Lack of demand for resource efficient products or services	8
Complexity associated with environmental labelling and certification	9
Complex environmental reporting requirements (N)	10
Other (DO NOT READ OUT)	11
None (DO NOT READ OUT)	12
Don't know/No answer (DO NOT READ OUT)	13

FL498 - Q7 Modified

ASK ALL

Q8 Which of the following would help your company the most to be more resource efficient?

(READ OUT – MAX. 3 ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 8; ITEMS 10 AND 11 ARE EXCLUSIVE)

A tool to self-assess how resource efficient your company is with respect to other companies	1
Consultancy on how to improve resource efficiency in your company	2
Grants or subsidies	3
Advice on funding possibilities and financial planning for resource efficiency investments	4
Demonstration of new technologies or processes to improve resource efficiency	5
Database with case studies that show the benefits of resource efficiency for companies	6
Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	7
Clearer rules on the use of secondary raw materials	8
Other (DO NOT READ OUT)	9
None (DO NOT READ OUT)	10
Don't know/No answer (DO NOT READ OUT)	11

FL498 - Q8

ASK ALL

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

(READ OUT – ONE ANSWER ONLY)

Yes	1
No, but you are planning to define a strategy	2
No, and you are not planning to do so	3
You are already climate neutral (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

FL498 - Q14

ASK IF CODE 1 IN Q14

Q15 What actions is your company undertaking to be become climate neutral?

(READ OUT – MULTIPLE ANSWERS POSSIBLE) (RANDOMISE ITEMS 1 TO 4; ITEMS 6 AND 7 ARE EXCLUSIVE)

Generally reducing carbon emissions of your company	1
Adopting/purchasing new technological solutions to reduce emissions	2
Developing new technological solutions to reduce emissions	3
Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

FL498 - Q15

ASK IF CODES 1 TO 3 in SCR16 (SELLING PRODUCTS)

N2 Does your company use recycled materials in your products? If yes, what is the share of recycled materials in your products/production?

CLARIFY IF NEEDED: This refers to the physical quantity (in kg, liters, etc.) of recycled materials. In case different materials are used in your products, choose the material that is the most important one.

(READ OUT - ONE ANSWER ONLY)

No recycled materials are being used	1
Less than 5%	2
Between 5%-19%	3
Between 20%-49%	4
Between 50%-74%	5
75% and more	6
Don't know/No answer (DO NOT READ OUT)	7

New

ASK IF CODES 1 TO 3 in SCR16 (SELLING PRODUCTS)

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

(READ OUT - ONE ANSWER ONLY)

Yes, for all of your products	1
Yes, but only for some of your products	2
No	3
Don't know/No answer (DO NOT READ OUT)	4

New

ASK ALL

INTRO_Q9 (READ OUT) Green products and services are those with a predominant function of reducing environmental risk and minimise pollution and resources. For the purpose of this survey, this may also include products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content, or eco-designed...)

ASK ALL

Q9 Does your company offer green products or services?

(READ OUT - ONE ANSWER ONLY)

Yes	1
No, but you are planning to do so in the next 2 years	2
No and you are not planning to do so	3
Don't know/No answer (DO NOT READ OUT)	4

FL498 - Q9

ASK IF CODE 1 IN Q9

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

(READ OUT - ONE ANSWER ONLY)

Up to 5%	1
6-10%	2
11-30%	3
31-50%	4
51-75%	5
More than 75%	6
Don't know/No answer (DO NOT READ OUT)	7

FL498 - Q10

ASK IF CODE 1 IN Q9

Q13 What type of support does your company rely on for the production of its green products or services?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 3; ITEM 5 IS EXCLUSIVE)

Its own financial resources	1
Its own technical expertise	2
External support	3
Other (DO NOT READ OUT)	4
Don't know/No answer (DO NOT READ OUT)	5

FL498 - Q13

ASK IF CODE 3 IN Q13

DX1 Which type of external support does your company get for the production of its green products or services?

(READ OUT - MULTIPLE ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 7; ITEM 9 IS EXCLUSIVE)

Public funding such as grants, guarantees or loans	1
Private funding from a bank, investment company or venture capital fund	2
Private funding from friends or relatives	3
Advice or other non-financial assistance from public administration	4
Advice or other non-financial assistance from private consulting and audit companies	5
Advice or other non-financial assistance from business associations and clusters	6
Advice or other non-financial assistance from supply chain partners	7
Other (DO NOT READ OUT)	8
Don't know/No answer (DO NOT READ OUT)	9

FL498 - DX1

ASK IF CODE 1 IN Q9

DX3 What type of support would help you the most to expand your range of green products or services ?

(READ OUT - MAX. 2 ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 4; ITEMS 6 AND 7 ARE EXCLUSIVE)

Financial incentives for developing products, services or new production processes	1
Assistance with identifying potential markets or customers	2
Technical support and consultancy for the development of products, services and production processes	3
Consultancy services for marketing or distribution	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

FL498 - DX3

ASK IF CODE 2 OR 3 IN Q9

DX4 What type of support would help you the most to launch your range of green products or services ?

(READ OUT - MAX. 2 ANSWERS POSSIBLE) (ROTATE ITEMS 1 TO 4; ITEMS 6 AND 7 ARE EXCLUSIVE)

Financial incentives for developing products, services or new production processes	1
Assistance with identifying potential markets or customers	2
Technical support and consultancy for the development of products, services and production processes	3
Consultancy services for marketing or distribution	4
Other (DO NOT READ OUT)	5
None (DO NOT READ OUT)	6
Don't know/No answer (DO NOT READ OUT)	7

FL498 - DX4

ASK ALL

INTRO_DX5 (READ OUT) A green job is one that directly deals with information, technologies, or materials that preserves or restores environmental quality. This requires specialised skills, knowledge, training, or experience (e.g. verifying compliance with environmental legislation, monitoring resource efficiency within the company, promoting and selling green products and services).

ASK ALL

DX5 In your company, how many of your full time employees, including yourself, work in green jobs some or all of the time?

(WRITE DOWN NUMBER OF EMPLOYEES) (ITEMS 999997 AND 999998 ARE EXCLUSIVE)

NUMERIC FIELD, 5 DIGITS, FOLLOWED BY: (full-time employees in green jobs) [VALID RANGE 0-750000, INTEGERS ONLY]

None (DO NOT READ OUT)	999997
Don't know/No answer (DO NOT READ OUT)	999998

FL498 - DX5

Data annex

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	66▲5	66▲2	57=	49▲3	48▲1	33=	29▲3	24▲5	22▼-2	2=	6▼-3	1=
BE	77▲8	83▲4	65▲4	55▲7	48▲10	44▲8	34▲9	38▲3	28=	1▼-4	5=	0▼-1
BG	61▲24	60▲30	50▲23	50▲29	27▲8	29▲21	21▲15	10▲6	20▲6	3▼-4	7▼-13	2▼-1
CZ	65▲9	75▲4	61▲10	51▲8	47▲2	35▲4	39▲4	17▲7	28▲2	0▼-1	8▼-5	0=
DK	76▲31	63▲31	56▲25	49▲27	42▲16	35▲16	30▲16	34▲22	22▲9	5▲1	7▼-9	1▼-4
DE	66▼-3	59▲2	52▼-2	35▼-7	39▼-11	33▼-1	32▲6	37▲6	22▼-4	2=	10▼-5	1▼-1
EE	52▲6	46▲4	39▼-7	33▲3	36▲9	19▼-1	17▼-1	9▲2	12▼-7	0=	17▼-6	0▼-1
IE	40▲2	49=	24▲3	29=	55▲3	26▼-2	16▼-1	13▲1	8=	1▼-1	3▼-6	3▼-1
EL	67▲15	52▲9	56▲6	48▲10	33▼-14	34▼-3	23▲1	16▲4	15▼-7	0▼-1	13=	0=
ES	84▲6	82=	79▼-6	73▲3	77=	53▼-1	45▲9	26▲8	28▼-6	0▼-1	2▼-3	0=
FR	76▲35	70▲21	51▲11	65▲27	51▲9	39▲14	34▲10	11▲4	24▲3	2▲1	6▼-6	0▼-2
HR	52▲1	50▼-9	41▼-6	34▼-6	32▼-1	16▼-7	16▼-8	10▲5	17▼-4	1▲1	14▲3	2▲1
IT	58▼-5	79▼-5	56▼-3	38▼-7	48▲5	28▼-4	28▲2	32▲6	22▼-1	2=	1▼-2	4=
CY	57=	41▲7	39▼-5	32▼-5	50▲7	24▲2	13▲3	15▼-3	8▼-2	0=	13▼-3	0=
LV	52▼-9	41▼-4	47▼-7	39▼-1	15▼-7	20▼-7	14▼-8	9▲5	17▼-6	5▲3	25▲15	0=
LT	72▲15	63▲15	78▲15	64▲18	33▲18	43▲8	27▲5	18▲8	26▼-1	0▼-3	8=	0=
LU	57▼-1	66▼-3	49▼-5	44=	53▲1	37▼-6	31▼-3	30▲13	31▲5	4▼-1	4▼-3	0=
HU	66▼-3	54▼-4	45▼-16	46▼-4	23▼-12	20▼-9	14▼-13	23▲6	19▼-6	5▲4	17▲10	0▼-1
MT	36▼-1	45▼-3	39▼-7	49=	45▲4	42▲4	24▲1	18▼-6	25▼-2	2▼-1	5▼-4	0=
NL	58▼-5	62▼-8	61▲2	32▼-4	56▲4	26▼-9	28▼-4	41▼-4	31▲7	3▲2	2▼-4	1=
AT	63▼-2	74▲7	55▼-4	44▼-1	47=	35▲7	28▲6	35▲3	21▼-8	0▼-1	2▼-3	0=
PL	64▲7	50▼-3	53▼-2	48▲3	37▲5	23▼-2	14▼-3	15▲6	16▼-6	1▼-1	8▼-11	2▲2
PT	42▼-5	20▼-6	30▼-4	35▼-3	55▲5	14=	10▼-2	17▲8	20▲5	7▲1	4▼-2	5=
RO	54▼-12	47▼-22	45▼-22	42▼-18	34▼-5	34▼-4	26▼-5	11▲3	19▼-7	0▼-1	16▲3	2▲2
SI	43▼-8	51▼-7	38▼-4	28▼-6	37▲1	25▼-9	24▲7	19▲7	15▼-8	5▲1	18▲6	0=
SK	82▲5	82=	74▼-3	78▲6	51▼-2	39▼-5	26▼-8	14▲6	20▼-6	0=	4▲1	0=
FI	65▲6	63▲2	63▲5	38▲7	50▲9	29▲1	36▲6	30▲4	18▼-5	0▼-2	6▼-3	1▲1
SE	69▼-6	76▼-9	76▼-4	39▼-9	57▼-11	39▼-12	33▼-10	42▼-1	17▼-6	2▲1	8▲3	0=

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q1 What actions is your company undertaking to be more resource efficient? [MULTIPLE ANSWERS]

	Saving energy	Minimising waste	Saving materials	Saving water	Recycling, by reusing material or waste within the company	Switching to greener suppliers of materials	Designing products that are easier to maintain, repair or reuse	Using predominantly renewable energy (e.g. including own production through solar panels, etc.)	Selling your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	66	66	57	49	48	33	29	24	22	2	6	1
UK	53	73	49	46	68	44	30	26	16	1	1	1
IS	35	55	41	18	34	31	23	20	18	2	11	4
NO	55	75	48	28	53	40	37	18	19	4	10	1
CH	69	71	53	40	54	46	30	37	25	2	4	3
ME	38	48	28	35	16	25	4	8	17	0	18	0
MD	60	19	33	39	16	12	6	8	7	3	18	4
MK	22	20	19	12	14	6	7	4	11	10	35	3
AL	21	9	19	16	16	4	6	7	6	0	53	0
RS	40	35	39	28	21	13	11	5	22	0	22	1
TR	54	57	59	53	43	42	36	11	23	0	15	1
US	68	78	67	61	68	48	46	14	25	0	6	0

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	58▲4	53▲3	47▼-1	45▲4	41▲2	35▲3	34▲4	29▲1	22▼-1	2=	17▼-4	3=
BE	77▲18	80▲20	62▲12	57▲9	48▲10	52▲8	59▲9	36▲5	30▼-5	0▼-4	9▼-8	1▼-1
BG	53▲26	57▲33	49▲22	48▲31	31▲17	35▲23	29▲20	27▲22	23▲14	1=	13▼-16	6▲1
CZ	60▲4	65▲3	54▲4	50▲9	41=	35▲3	33▲7	37▲2	29▲2	2=	16▼-3	0▼-1
DK	56▲32	46▲31	42▲28	37▲28	38▲23	29▲18	30▲19	21▲11	21▲12	4▼-2	24▼-21	4▼-1
DE	57▲11	43▲11	46▲12	35▲8	36▲7	36▲13	42▲12	26▲7	19=	3▼-2	20▼-14	2▼-1
EE	51▲13	42▲11	43▲8	37▲14	31▲9	23▲3	15▲3	21▲2	12▼-6	1=	20▼-16	1=
IE	29▲5	12▼-2	21▼-1	9=	21▲1	18▼-1	17▲3	16▲3	7▼-3	6▲2	10=	5▼-2
EL	68▲5	51▲4	51▲4	49▲9	41▼-3	43▼-1	40▲11	28=	26▲4	0=	17▲5	0=
ES	84▼-1	85▲3	81▼-5	79▲7	79▲1	65▼-1	50▲5	56▲13	36▼-9	0▼-2	2▼-2	1=
FR	66▲24	62▲14	42▲4	54▲16	43▲7	41▲15	28▲12	28▲3	28▲9	1=	11▼-2	2▼-2
HR	42▼-7	43▼-8	33▼-9	31▼-7	23▼-11	21▼-4	25▼-2	18▼-7	14▼-7	2=	26▲11	4▲3
IT	50▼-1	41▼-3	41▼-9	37▼-4	35▲1	21▲1	31▼-3	27▼-3	15=	1=	22▼-7	5▲1
CY	50▲1	37▲6	35▼-2	25▼-5	31▼-1	28▼-3	38=	14=	11▼-8	2▲2	23▲2	1▲1
LV	44▼-14	34▼-12	44▼-11	32▼-11	14▼-7	23▼-6	17▼-4	20▼-7	20▼-9	3▲2	31▲18	4▲3
LT	80▲19	73▲21	76▲16	72▲19	37▲18	55▲18	46▲19	30▲5	38▲9	1▼-1	8▼-6	0=
LU	33▲1	22▼-5	23▲3	20▼-3	29▲5	18▼-1	19▲1	26▲4	18▲1	8▼-2	17▼-5	4▲3
HU	46▼-13	39▼-9	41▼-6	38▼-4	24▼-3	19▼-12	32▼-3	20▼-8	16▼-5	2▼-2	31▲15	3=
MT	14▼-7	15▼-2	16▲2	11=	11▼-6	19▼-2	24▼-4	6▼-2	8=	14=	28=	15▲5
NL	43▼-1	43=	33▼-4	24▼-2	34▲2	25▼-1	37▼-3	22▼-3	19▼-2	2=	22▼-9	7▲2
AT	50▼-3	53▲3	39▼-4	33▲2	38▼-1	10▼-3	32▲3	26▲4	26=	1=	12▼-8	1▼-11
PL	49▼-2	44▼-6	41▼-5	42=	34▲4	27▲1	21▲1	17▼-2	19▼-4	1=	22▼-3	2▼-1
PT	18▼-2	25▼-2	12▲2	10▲1	17▲3	13▼-3	20▼-3	5▼-5	8▼-1	9▲3	16▲4	11▲1
RO	63▼-13	55▼-18	54▼-18	50▼-17	45▼-11	43▼-22	42▼-2	36▼-9	29▼-18	1=	10▼-3	1=
SI	22▼-22	20▼-25	18▼-15	14▼-16	20▼-8	16▼-19	21▼-3	8▼-6	8▼-12	8▲4	41▲17	0▼-2
SK	81▲4	79▲1	71▼-2	74▲1	53▼-2	47▼-3	30▼-2	32▼-4	30▼-5	2▲2	7▼-1	0=
FI	42=	34▼-3	29▼-6	16▼-5	23▼-6	17▼-5	19▼-3	15▼-6	14▼-7	2▼-1	39▲5	1▼-1
SE	60▼-8	59▼-11	50▼-12	40▼-4	54▼-1	38▼-8	41▼-11	33▼-10	20▼-3	3▲3	18▲7	0▼-3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q2 Over the next two years, what are the additional resource efficiency actions that your company is planning to implement? [MULTIPLE ANSWERS]

	Save energy	Minimise waste	Save materials	Save water	Recycle, by reusing material or waste within the company	Switch to greener suppliers of materials	Use predominantly renewable energy (e.g. including own production through solar panels, etc.)	Designing products that are easier to maintain, repair or reuse	Sell your residues and waste to another company	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	58	53	47	45	41	35	34	29	22	2	17	3
UK	65	63	42	35	58	54	26	30	16	1	9	3
IS	40	50	36	22	31	23	25	16	16	5	16	12
NO	52	59	47	22	50	44	30	37	22	1	16	2
CH	41	33	27	21	26	25	31	14	12	6	29	5
ME	51	52	29	36	28	10	20	9	14	0	13	3
MD	51	16	47	42	13	14	23	9	15	9	17	2
MK	23	21	18	12	10	9	16	8	15	8	32	5
AL	21	11	9	12	20	4	12	5	5	0	48	6
RS	32	28	22	19	22	13	21	8	19	2	25	2
TR	53	51	59	47	44	50	27	45	27	0	19	4
US	74	77	70	67	68	55	28	50	35	0	9	1

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

	Significantly decreased	Slightly decreased	Slightly increased	Significantly increased	Not changed (spontaneous)	Don't know/No answer
EU27	4=	26▼-1	20▼-1	16▲5	24▼-2	11▼-1
BE	6=	26=	20▲2	13▲6	25▼-6	9▼-2
BG	1▼-6	43▲9	18▲2	8▼-10	15▼-4	15▲9
CZ	3▲1	34▲2	22▲1	11▲5	22▼-9	8=
DK	5=	26▲11	14▼-4	5▲1	37▼-9	12▲1
DE	6▲4	22▼-2	24▲2	25▲9	18▼-8	5▼-5
EE	2▼-2	35▲7	14▲3	10▼-5	34=	6▼-4
IE	8▲1	20=	28▼-2	13▼-1	17=	14▲2
EL	6▲2	32▼-5	18▼-5	12▲6	31▲5	3▼-3
ES	4▼-2	22▼-2	27▲2	18▲5	24▲2	5▼-5
FR	4▼-1	15▼-6	19▼-10	30▲19	22▼-3	11▼-1
HR	8▲2	34▼-6	17▲4	9▼-2	17▼-4	14▲6
IT	1▼-1	34▲1	16=	9▲3	30▼-1	10▼-3
CY	7▲4	43▲12	11▼-10	7=	29▼-8	3▲2
LV	1▼-1	27=	19=	17▼-3	27▲3	9=
LT	4▲3	36▼-7	15▲6	2▼-1	28▲1	16▼-3
LU	9▲4	28▲4	26▲5	2▼-5	23▼-1	12▼-8
HU	7▲4	34▲2	16▼-1	12▼-2	24▼-4	6▲1
MT	4▲1	30▲1	22▲2	6▼-2	21▼-2	18=
NL	6▲2	19▼-3	17▲1	6▼-2	24▼-5	28▲6
AT	3▼-2	37▲3	19=	6▲1	23▼-3	11=
PL	1▼-2	21▼-5	18▲2	21▲5	20▼-2	20▲2
PT	13▲2	33▲2	18=	8=	21▼-1	7▼-2
RO	5▼-1	37▲2	16=	15▲2	18▲2	9▼-4
SI	6▲3	27▼-1	26▲5	9▲2	31▼-3	2▼-7
SK	3=	31▲7	21▼-2	9▼-4	23▼-4	14▲1
FI	5▲2	32▼-3	16=	6▲1	39▲2	3▼-3
SE	4▲2	24▼-6	25▲3	8▲2	32▲5	8▼-6

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q3 What impact have the undertaken resource efficiency actions had on the production costs over the past two years? The production costs have...

	Significantly decreased	Slightly decreased	Slightly increased	Significantly increased	Not changed (spontaneous)	Don't know/No answer
EU27	4	26	20	16	24	11
UK	8	17	24	9	28	13
IS	0	10	18	6	45	21
NO	3	21	30	11	22	12
CH	3	20	21	9	35	12
ME	1	29	9	13	25	22
MD	13	33	9	15	26	3
MK	8	26	14	24	20	8
AL	4	29	16	11	33	6
RS	9	36	10	25	15	6
TR	8	34	12	25	14	8
US	3	19	26	24	17	11

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) & n=3 299 (SMEs in non-EU countries) – **Companies undertaking resource efficiency actions**

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

	Nothing	Less than 1% of annual revenue	1%-5% of annual revenue	6%-10% of annual revenue	11%-30% of annual revenue	More than 30% of annual revenue	Don't know/No answer
EU27	26▲1	22▲1	28=	8▲1	3=	2▲1	11▼-3
BE	22▼-3	19▲1	33▼-3	10▲2	3▼-2	1=	13▲4
BG	24▼-2	20▲1	27▲5	14▲1	5▼-1	4▲2	6▼-7
CZ	31▼-4	20▼-3	27▼-3	11▲7	5▲2	3▲2	3▼-2
DK	36▲13	18▲6	17▼-4	8▲1	5▲3	3=	14▼-19
DE	21=	18▼-6	32▲3	10▲2	3▲1	1=	14▲1
EE	42▲7	22▲3	23=	6▼-3	1▼-5	2=	4▼-2
IE	12▲2	14▼-1	29▼-4	13=	5▼-2	3▲1	24▲4
EL	28▲2	16▼-6	35▲2	12=	5▲2	1=	3=
ES	25▲1	12▼-7	43▲10	10▲1	3▼-1	3▲2	4▼-7
FR	36▲6	28▲11	17▼-1	5▼-2	2▼-1	2▲1	10▼-13
HR	18▲4	22▼-6	34▼-4	8=	4▲2	3▲2	11▲3
IT	15▼-6	30▲6	23▼-4	10▲4	2=	3▲2	17▼-2
CY	32▲1	27▲4	24▼-9	8▲6	3▼-1	3▲2	3▼-2
LV	35▲2	24▼-3	21▲1	7▼-1	4=	1=	8▲1
LT	48▲12	24▼-2	16▼-2	6▼-6	1▼-2	2▲1	3▼-1
LU	28▲1	32▲6	24▼-3	4=	0▼-1	0=	12▼-4
HU	16▼-8	27=	33▲8	5▼-4	5▲1	2=	12▲4
MT	17▲2	17▼-4	30▼-1	5▲3	1=	0=	30=
NL	26▲3	19▼-1	27=	3▼-4	4▲1	4▲1	16▼-1
AT	22▲8	24▲1	33▼-6	4▼-5	2▼-1	2▲1	13▲2
PL	35▲2	24▲1	22=	6=	2▼-2	3▲1	8▼-1
PT	16▲1	13=	30=	13▲3	4▼-2	2▼-1	22▼-1
RO	22▼-2	28▼-1	29▲2	11▲1	4▼-1	4▲1	3▼-1
SI	31▲10	24▼-5	21▼-9	12▲2	7▲2	2▲1	3▼-1
SK	27▼-3	27▲3	28▲3	11▲2	2▼-1	1▼-3	5▼-1
FI	34▲7	21▼-3	22▼-8	13▲8	4▼-1	0▼-3	5=
SE	36▲13	19▼-6	25▼-2	10=	5▲1	1▼-1	4▼-6

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q4 Over the past two years, how much have you invested on average per year to be more resource efficient?

	Nothing	Less than 1% of annual revenue	1%-5% of annual revenue	6%-10% of annual revenue	11%-30% of annual revenue	More than 30% of annual revenue	Don't know/No answer
EU27	26	22	28	8	3	2	11
UK	34	12	26	8	3	5	12
IS	40	19	24	2	2	0	13
NO	14	17	35	13	3	5	14
CH	18	22	32	10	2	2	14
ME	43	2	12	17	13	2	11
MD	25	20	10	20	2	1	22
MK	22	21	20	17	6	5	10
AL	25	10	29	16	1	3	16
RS	20	20	29	13	10	3	6
TR	39	11	25	11	3	3	8
US	19	18	29	11	7	1	16

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) & n=3 299 (SMEs in non-EU countries) – **Companies undertaking resource efficiency actions**

N1a Does your company use renewable energy sources?

	Yes, you generate renewable energy onsite (e.g. solar panels, wind power)	Yes, you purchase energy from a renewable energy supplier	No	Don't know/No answer
EU27	12	23	63	2
BE	34	16	47	3
BG	7	9	83	2
CZ	13	12	75	1
DK	14	32	48	7
DE	23	22	53	3
EE	11	15	73	2
IE	9	45	47	0
EL	13	13	74	0
ES	14	17	64	4
FR	6	22	70	3
HR	11	5	83	2
IT	4	32	63	2
CY	11	4	85	0
LV	9	10	79	2
LT	11	14	73	3
LU	11	44	42	4
HU	23	5	71	1
MT	4	25	69	3
NL	10	39	51	1
AT	17	41	42	1
PL	14	15	68	4
PT	9	44	46	2
RO	10	12	78	1
SI	16	21	60	2
SK	9	12	76	3
FI	10	37	47	6
SE	12	44	40	5

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)

N1a Does your company use renewable energy sources?

	Yes, you generate renewable energy onsite (e.g. solar panels, wind power)	Yes, you purchase energy from a renewable energy supplier	No	Don't know/No answer
EU27	12	23	63	2
UK	16	33	50	1
IS	2	63	30	5
NO	8	33	52	7
CH	25	23	46	7
ME	8	10	82	0
MD	9	21	69	0
MK	8	20	71	1
AL	5	0	94	1
RS	5	8	87	1
TR	3	5	92	0
US	9	10	77	4

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

N1b What share of energy consumed in your company is generated on-site (e.g. via solar panels, wind power)?
Caution: small base size in many countries (n<100)

	75% and more	Between 50%-74%	Between 20%-49%	Between 5%-19%	Less than 5%	Don't know/No answer
EU27	17	15	23	20	14	10
BE	7	15	32	21	9	16
BG	28	21	9	19	18	5
CZ	6	18	46	13	9	8
DK	21	20	12	28	6	14
DE	14	13	23	16	18	17
EE	3	0	27	37	20	13
IE	0	8	8	47	30	8
EL	30	4	32	6	27	1
ES	18	27	14	14	11	15
FR	39	1	10	34	10	6
HR	22	16	20	26	8	8
IT	1	1	22	42	34	1
CY	15	21	13	31	11	9
LV	10	8	28	25	15	13
LT	51	16	4	20	9	0
LU	1	20	1	52	26	0
HU	22	29	24	8	11	6
MT	0	0	10	45	41	3
NL	19	13	11	37	15	6
AT	0	10	5	59	26	1
PL	19	24	37	12	4	5
PT	5	7	27	34	27	0
RO	34	11	16	6	22	11
SI	37	12	16	6	8	21
SK	10	22	38	26	3	1
FI	4	9	21	20	30	16
SE	24	13	31	18	4	10

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=2 258 (EU SMEs) – **Companies generating renewable energy onsite**

N1b What share of energy consumed in your company is generated on-site (e.g. via solar panels, wind power)?
Caution: small base size in many countries (n<50)

	75% and more	Between 50%-74%	Between 20%-49%	Between 5%-19%	Less than 5%	Don't know/No answer
EU27	17	15	23	20	14	10
UK	13	1	43	26	17	1
IS	0	0	0	4	97	0
NO	8	1	26	25	14	27
CH	23	15	28	12	9	13
ME	27	0	1	10	36	27
MD	0	2	77	0	13	7
MK	18	8	12	18	27	18
AL	37	7	17	5	27	7
RS	3	3	18	21	22	34
TR	13	28	24	9	25	1
US	24	7	27	12	19	12

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=2 258 (EU SMEs) & n=539 (SMEs in non-EU countries) – **Companies generating renewable energy onsite**

Q5 Which type of support does your company rely on in its efforts to be more resource efficient?
[MULTIPLE ANSWERS]

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	61▼-3	50▼-4	23▼-1	3▲1	6▲1
BE	71▼-2	43▲4	26▲6	3▼-2	16▲6
BG	69▲6	53▼-6	14▼-7	4▲2	3=
CZ	77▼-2	67▼-5	18▼-3	1=	4▲1
DK	55▲10	48▼-11	24▼-1	5▲3	7=
DE	68▼-2	59▲2	27▼-1	5▲3	6▲3
EE	78▲3	61▼-5	5▼-3	1▼-1	5▲2
IE	60▲7	28▼-1	26▼-1	0▼-4	8▲2
EL	78▲2	44▼-6	16▼-2	2▲1	2▲1
ES	59▼-13	44▼-9	26▼-5	5▲4	9=
FR	42▼-6	33▼-7	30▲11	4▼-1	9▲1
HR	66▼-9	38▼-12	12▲1	3▲2	7▲5
IT	50▲1	59=	26▼-1	0=	2=
CY	69▲7	41▲4	15▼-5	4▼-1	4▼-3
LV	58▼-6	50▲4	6▼-10	1▼-1	9▲5
LT	74=	50▲1	15▲1	3▼-1	7▲5
LU	66▲6	35=	24▼-4	2▼-1	5▲2
HU	64▼-3	41▼-2	33▲3	4▲3	7▲3
MT	70▲1	49▼-1	33▲4	2▼-1	5▼-1
NL	64▲1	42▼-3	29▲4	1=	4▼-2
AT	80▲1	63▼-5	30▼-12	0▼-2	0▼-4
PL	60▼-10	61▼-7	6▼-6	0▼-1	4▲2
PT	56▼-2	42=	12▼-2	4▲1	8▼-1
RO	86▼-7	40▼-20	8▼-6	1=	1▼-1
SI	73▲3	62▼-4	20▲3	3=	3▲2
SK	78▲1	61▼-7	22▼-2	1=	6▲3
FI	61▲5	55▼-7	22▼-1	1▼-1	2▼-3
SE	66=	57=	15▼-9	3▲2	8▼-1

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q5 Which type of support does your company rely on in its efforts to be more resource efficient? [MULTIPLE ANSWERS]

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	61	50	23	3	6
UK	61	59	26	0	8
IS	49	37	10	1	27
NO	59	46	39	2	6
CH	63	45	41	2	7
ME	54	45	16	0	11
MD	74	30	10	10	2
MK	68	23	13	4	6
AL	68	12	22	0	2
RS	66	35	29	2	3
TR	57	35	21	1	10
US	62	49	31	2	12

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) & n=3 299 (SMEs in non-EU countries) – **Companies undertaking resource efficiency actions**

Q6 More precisely, which type of external support is it? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other (spontaneous)	Don't know/No answer
EU27	35	28	10	26	41	27	28	6	4
BE	37	33	9	48	51	44	33	3	1
BG	47	36	16	27	10	35	20	6	3
CZ	41	39	20	32	62	37	39	2	3
DK	13	25	0	26	48	41	43	10	6
DE	37	35	20	39	24	32	34	11	5
EE	60	33	4	22	39	45	55	0	1
IE	51	18	9	38	18	23	21	0	4
EL	55	37	11	35	58	37	62	0	0
ES	31	40	8	30	52	27	26	4	0
FR	42	19	7	28	27	25	27	5	14
HR	24	19	17	19	3	19	16	15	21
IT	26	15	8	9	66	20	14	6	0
CY	35	25	16	19	50	56	28	10	0
LV	32	16	10	6	17	24	21	24	5
LT	61	34	19	47	44	45	51	0	0
LU	24	9	12	58	28	31	29	6	0
HU	80	36	1	20	21	25	26	7	2
MT	45	40	8	9	20	19	11	14	0
NL	29	29	10	30	26	19	26	2	3
AT	32	30	8	41	49	38	26	11	0
PL	17	37	13	12	18	13	26	8	7
PT	16	46	0	6	24	29	10	15	0
RO	38	35	14	17	43	28	34	6	0
SI	16	18	11	22	23	17	47	5	10
SK	28	34	18	33	43	36	46	3	7
FI	24	21	5	27	38	50	42	6	3
SE	38	17	7	22	51	45	44	3	0

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=3 095 (EU SMEs) – **Companies relying on external support in their efforts to be more resource efficient**

Q6 More precisely, which type of external support is it? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<50)

	Public funding such as grants, guarantees or loans	Private funding from a bank, an investment company or venture capital fund	Private funding from friends and relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other (spontaneous)	Don't know/No answer
EU27	35	28	10	26	41	27	28	6	4
UK	45	14	18	34	26	22	37	18	0
IS	36	11	19	20	29	21	42	1	28
NO	54	27	11	36	24	36	37	2	8
CH	32	23	12	26	32	33	50	2	4
ME	8	18	0	0	48	0	32	0	0
MD	33	64	29	4	7	4	21	9	0
MK	20	38	13	9	21	6	10	5	2
AL	27	25	3	0	1	2	25	1	25
RS	76	17	3	32	6	17	21	7	3
TR	17	11	9	21	24	15	24	0	17
US	22	25	20	38	31	43	54	5	8

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=3 095 (EU SMEs) & n=999 (SMEs in non-EU countries) – **Companies relying on external support in their efforts to be more resource efficient**

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS] ** Response option not included in 2021*

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements*	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Lack of supply of required materials, parts, products or services	Complexity associated with environmental labelling and certification	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	35▲1	28▲1	26	25▲4	24▲1	22▲2	21▲2	20▼-4	20▲1	18▼-2	1=	26▼-6	3=
BE	41▲5	28▲8	27	30▲9	24▲5	27▲4	29▲4	22▼-6	25▲5	22=	0=	29▼-5	1▼-3
BG	41▲14	26▲16	22	17▲7	26▲15	18▲9	28▲11	18▲7	17▲10	24▲17	3▼-1	22▼-14	3▼-5
CZ	49▲2	26▲1	34	19▲3	20▼-4	19▲1	21▼-1	22▼-8	18=	22▼-1	0▼-1	24▲2	1=
DK	24▲15	39▲24	26	13▲4	20▲11	23▲11	9▲1	16▼-1	24▲12	21▲13	4▼-1	28▼-15	6=
DE	32▲3	31▲9	33	23▲7	22▲3	18▲2	16▼-1	23▼-7	30▲4	18▼-1	4▲3	28▼-10	3=
EE	11▼-6	14▼-4	12	10▼-3	10▼-4	10▼-3	9▼-3	11▼-10	11▼-6	15▼-7	0=	51▲9	3▼-1
IE	9=	25▲3	15	4▼-2	10▲2	16▲3	1▼-4	22▲1	6▼-2	12▲3	2▲1	10▼-2	5▼-5
EL	37▼-3	37=	29	17=	25▼-5	25▲2	22▼-3	23▼-6	29▲1	22▼-1	0=	33▲5	0=
ES	53=	47▲2	40	40▲9	46▼-1	34▲1	38▲9	32▼-7	27▼-2	30▼-8	0=	18=	3▲2
FR	39▲15	36▲13	29	38▲22	28▲13	34▲15	32▲18	21▼-2	23▲9	22▲7	0▼-2	14▼-19	4▼-1
HR	34▼-7	15▼-2	15	13▼-8	16▼-2	11▼-3	22▼-6	11▼-10	11=	10▼-13	2▲1	32▲7	6▲2
IT	28▼-4	17▼-7	22	18▼-2	15▼-2	15▼-1	16▲1	10▲1	15▲1	9▼-3	2▲2	34▼-11	1=
CY	33▼-1	35▼-5	23	19▲7	20▼-2	21▲1	12▼-3	17▼-10	24▲5	12▼-6	0=	39▲6	1▼-1
LV	26▼-6	23▼-4	18	12▼-6	19▼-6	12▼-12	17▼-6	14▼-16	7▼-10	14▼-8	1▼-1	42▲21	2▼-1
LT	32▲4	24▲10	34	30▲20	31▲11	26▲7	17▲6	19▼-8	23▲11	14▼-6	1▲1	40▲7	0▼-1
LU	30▼-1	22▼-5	5	21▼-4	16▼-1	19▼-4	19▼-2	29▲7	14▼-5	17▼-3	2▲1	20▼-4	9▲2
HU	32▼-1	23▼-3	18	21▼-1	10▼-5	11▼-13	20▲6	11▼-13	10▼-1	6▼-11	2▲1	38▲10	5▲1
MT	17▼-3	13=	10	11▲2	15▲1	8▼-3	20▲3	19▼-3	6▼-2	12=	8▲2	37▼-4	3▼-3
NL	13▼-1	18▼-2	12	12=	20▲2	16▲2	6▼-6	15▼-2	17=	6▼-4	0=	48▼-1	1▼-2
AT	35=	30▲1	11	17▼-4	27▲6	18=	9▼-7	18▲1	15=	27▲7	2▲2	18▼-18	3▲2
PL	45▲2	23▼-4	24	35▼-5	30▲4	22▼-4	13▼-6	22▼-1	20▼-5	23▼-2	2▲1	16▼-4	2▼-3
PT	20=	14▼-3	14	14▼-3	9▼-1	16▲3	12▲2	18▲2	10▲1	11▲2	4▼-1	21▼-4	9▼-4
RO	34▼-13	21▼-10	23	29▼-7	20▼-14	21▼-7	25▼-8	21▼-9	20▼-7	25▼-7	0=	26▼-2	2▲1
SI	30▲11	25▲1	17	14▲2	19▲5	11▼-1	6▼-7	13▼-7	14=	7▼-9	8▲2	36▼-5	0▼-1
SK	44▼-8	27▼-3	29	23▼-1	14▼-8	16▼-2	22▲1	18▼-12	18▼-7	18▼-7	1▲1	30▲6	3▲2
FI	21▼-1	26▲3	20	19▲1	15▲1	24▲2	15▼-5	21▲3	22▼-1	11▼-7	0=	34▲6	2▼-1
SE	20▼-9	29▼-6	26	15▼-6	15▼-7	26▼-7	14▼-5	19▼-12	18▼-4	19▼-6	0=	34▲4	4▲3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) – **Companies undertaking resource efficiency actions**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q7 Did your company encounter any of the following difficulties when trying to set up resource efficiency actions? [MULTIPLE ANSWERS] ** Response option not included in 2021*

	Complexity of administrative or legal procedures	Cost of environmental actions	Complex environmental reporting requirements*	Difficulty to adapt environmental legislation to your company	Lack of specific environmental expertise	Difficulty in choosing the right resource efficiency actions for your company	Technical requirements of the legislation not being up to date	Lack of supply of required materials, parts, products or services	Complexity associated with environmental labelling and certification	Lack of demand for resource efficient products or services	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	35	28	26	25	24	22	21	20	20	18	1	26	3
UK	15	26	15	13	17	14	14	16	27	27	0	31	1
IS	23	21	24	13	17	16	16	25	19	18	0	31	13
NO	32	47	33	24	29	35	16	27	18	27	1	22	3
CH	22	33	17	22	17	19	10	17	21	19	1	28	6
ME	28	4	11	13	4	7	12	18	7	5	0	40	3
MD	32	16	7	23	15	19	23	18	10	15	12	26	10
MK	21	12	13	15	10	9	10	6	8	12	9	37	5
AL	22	1	1	15	6	1	1	1	7	1	0	50	9
RS	42	22	19	19	21	19	20	10	18	14	1	26	5
TR	35	35	26	28	31	30	27	30	34	33	0	30	2
US	17	24	15	17	18	21	15	16	29	25	0	40	4

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=12 184 (EU SMEs) & n=3 299 (SMEs in non-EU countries) – **Companies undertaking resource efficiency actions**

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	37▲1	25▼-1	25=	23▲3	22=	19▼-1	16▲1	15=	1=	15▼-2	4=
BE	44▲8	33▲3	26▲4	30▲10	29▲6	24▲7	22▲3	24▼-1	1▼-1	16▼-1	1▼-2
BG	41▲6	27▲8	24▲5	25▲11	15▼-4	19▲13	19▲4	12▲5	0▼-3	18▲4	1▼-4
CZ	32▼-1	23▼-8	21▲2	30▲7	28▼-5	19▼-3	19▲3	8▲1	2▼-1	19▲3	2▼-1
DK	30▲2	25▲7	30▲7	19▲6	27▲10	9▲4	23▲15	19▲10	6▲3	15▼-9	5▼-4
DE	34▲2	18▼-1	17▼-7	15▼-3	23=	17▼-2	21▲2	20=	1▼-1	24▼-2	2=
EE	33▲4	22▼-2	14▼-4	17▼-4	19▼-2	9▲2	16▲7	7▲1	2▲1	25▼-3	2▼-4
IE	39▼-6	18▼-5	14▼-5	19▲1	27=	15▼-3	13▼-1	21▲1	0▼-2	10▲3	3▼-1
EL	56▲2	16▼-7	31▼-3	31▼-1	26▲2	6▼-6	16▼-1	16▼-2	0=	12▼-2	1▲1
ES	46▼-5	32▼-3	38▲5	33▲7	23▲1	20▼-5	25▲6	23▲4	1▼-1	6=	4▲2
FR	40▲5	28▲8	23▲3	27▲13	21▲5	17▲6	13▲1	14▲5	3▲2	9▼-14	2▼-5
HR	45=	15▼-13	16▼-8	18▼-10	14▼-6	9▼-3	9▼-1	8▲1	1▲1	22▲9	4▲2
IT	20▼-2	28▼-3	29=	19▼-1	23▲3	28▲1	11▼-4	11▼-5	0▼-1	14▼-2	7▲3
CY	59▲9	10▼-15	30▼-2	31▲11	31▲10	11▲3	16▲5	11▼-7	0=	18=	1▲1
LV	28▼-9	11▼-10	18▼-4	19▼-8	16▼-9	10▼-11	9▼-6	6▼-7	2▲1	27▲16	5▲3
LT	47▲11	22=	33▲7	34▲8	24=	18▲4	15▲2	12▼-2	0▼-2	18=	0=
LU	27=	18▼-6	22▼-6	27=	27=	21▲4	16=	11▼-3	4▼-1	14=	1▼-2
HU	47▲2	14▼-6	19▲3	12▼-9	26▼-5	6▼-6	10▼-7	7▼-2	4▲4	25▲12	2▼-1
MT	57▼-4	28▲3	16▼-3	34▼-3	17▼-4	10▲2	18▲1	11=	4▲1	13▼-3	4▼-2
NL	33▼-2	32=	28▲2	12▼-3	19▼-3	10▲1	16▲1	14▼-9	0=	23=	6▲1
AT	32▲2	21▲1	18▼-5	31▲4	20▼-2	19▲2	24▲1	14▼-8	0▼-4	13▼-1	2=
PL	40▲8	16▼-5	14▼-4	22▲6	15▼-4	25▼-6	16▲2	14▲3	2▲1	16▼-4	5▲3
PT	27▲1	20▼-1	22▼-3	29▲9	13▼-4	17▼-2	6▼-3	8▼-1	2▼-2	9=	12▲1
RO	45▼-7	30▼-4	26▼-3	34▲2	21▼-2	20=	17▼-5	7▼-4	0=	11▲2	3▲1
SI	53▼-3	15▼-1	16▼-8	16▼-10	13▼-2	15▲5	17▲9	8▲4	7▲3	17▼-1	0▼-3
SK	50▼-2	22▼-2	26▲4	30▲3	22▼-4	16▼-8	21▲4	7▼-1	2▲1	12▲1	3=
FI	32▲4	29▼-2	27▲10	13▼-3	19▼-2	19▲4	18▲4	22▲3	2=	19▼-3	1▼-1
SE	36=	24▼-10	27▼-7	17▼-6	22▼-2	11▼-6	17=	19▼-6	2▲1	16▲6	6▲5

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q8 Which of the following would help your company the most to be more resource efficient? [MULTIPLE ANSWERS]

	Grants or subsidies	Better cooperation between companies across sectors so that new processes to re-use waste and by-products can be developed	Consultancy on how to improve resource efficiency in your company	Advice on funding possibilities and financial planning for resource efficiency investments	Demonstration of new technologies or processes to improve resource efficiency	Clearer rules on the use of secondary raw materials	Database with case studies that show the benefits of resource efficiency for companies	A tool to self-assess how resource efficient your company is with respect to other companies	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	37	25	25	23	22	19	16	15	1	15	4
UK	43	24	16	31	20	12	14	20	0	12	2
IS	23	20	31	11	33	15	16	16	2	13	11
NO	35	37	16	29	22	14	14	24	3	9	4
CH	46	22	23	19	29	17	20	22	2	14	6
ME	61	18	4	20	18	12	15	6	3	10	4
MD	49	14	32	11	10	29	5	4	6	17	3
MK	43	19	11	14	8	7	5	4	10	22	4
AL	25	21	20	11	8	8	3	4	0	28	0
RS	56	19	21	17	15	13	9	4	2	15	1
TR	18	27	19	24	29	19	18	16	0	23	3
US	29	23	19	20	25	15	14	15	0	25	3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral (spontaneous)	Don't know/No answer
EU27	21▲2	19=	52=	4▼-1	3▼-1
BE	24▲8	20▼-6	51▲1	1▼-2	5▼-2
BG	12=	21▲8	59▼-7	5▲2	4▼-2
CZ	14▲2	18▲1	66▼-2	1=	1▼-1
DK	23▲2	12=	58▲1	5▲2	2▼-4
DE	21▼-5	10▼-6	66▲15	1▼-4	3=
EE	14▲3	18▲1	65▲5	1▼-5	2▼-4
IE	24▲3	36▲1	17▼-4	9▲1	15=
EL	11▼-5	29▼-4	55▲12	3=	2▼-2
ES	22▲7	14=	59▼-7	1=	4=
FR	28▲4	19▲3	45▼-7	4=	4=
HR	8▼-2	23▼-9	61▲16	4▼-4	5▼-2
IT	21=	30▲2	42▼-2	7▲1	0=
CY	6=	13▼-3	66▲12	11▼-8	5▼-1
LV	11▲1	8▼-12	69▲5	3▼-1	9▲8
LT	16▼-2	25▲1	52▲8	6▼-6	1▼-1
LU	27▲1	31▲1	34▼-5	6▲2	3▲1
HU	14▼-1	14▼-7	66▲11	3▼-3	3▼-1
MT	22▲2	53▲1	18▼-5	1▲1	6▲1
NL	31▲4	26▲6	34▼-10	4▲1	5=
AT	20▼-2	12▲4	34=	27▼-3	6▲1
PL	11▲1	11▼-1	71▲1	3=	5▼-1
PT	26▲2	27▲4	26▼-2	7=	15▼-5
RO	15▼-5	28▼-8	52▲14	4=	1=
SI	16=	12▼-4	64▲4	8▲1	0▼-1
SK	12▼-1	16▼-4	68▲7	2▼-1	3▼-2
FI	30▲10	6▼-9	60▲3	0▼-4	3=
SE	41▲3	8▲2	46▼-2	3▼-2	2▼-1

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q14 Does your company have a concrete strategy in place to reduce your carbon footprint and become climate neutral or negative?

	Yes	No, but you are planning to define a strategy	No, and you are not planning to do so	You are already climate neutral (spontaneous)	Don't know/No answer
EU27	21	19	52	4	3
UK	21	25	48	3	3
IS	20	24	50	0	6
NO	25	16	55	0	3
CH	32	11	47	4	6
ME	8	38	34	11	10
MD	24	13	31	25	8
MK	14	15	52	14	6
AL	13	10	46	27	4
RS	13	19	45	16	8
TR	8	15	71	3	4
US	23	13	58	1	5

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

Q15 What actions is your company undertaking to be become climate neutral? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<100)

	Generally reducing carbon emissions of your company	Adopting/purchasing new technological solutions to reduce emissions	Developing new technological solutions to reduce emissions	Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	53	47	35	10	4	8	3
BE	77	68	49	13	0	10	2
BG	56	55	16	5	1	18	0
CZ	65	66	58	16	0	5	0
DK	53	45	28	15	7	7	4
DE	69	47	30	18	5	9	4
EE	57	50	31	12	1	11	0
IE	54	58	32	33	3	0	0
EL	70	54	45	4	3	12	0
ES	84	63	50	6	3	0	0
FR	55	37	34	3	1	10	4
HR	49	49	40	6	1	10	0
IT	10	37	25	9	13	10	7
CY	81	65	33	13	0	1	0
LV	52	41	39	20	8	6	0
LT	75	46	21	11	2	7	2
LU	30	55	41	22	1	8	1
HU	45	31	51	14	14	2	0
MT	31	48	14	8	0	0	8
NL	40	48	39	7	0	12	1
AT	26	35	13	18	0	22	4
PL	57	59	35	16	5	8	7
PT	41	41	18	4	8	7	10
RO	72	50	48	4	1	8	2
SI	44	26	23	8	16	17	2
SK	63	58	40	11	13	3	0
FI	52	57	34	18	1	16	0
SE	73	53	33	16	4	6	0

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=3 083 (EU SMEs) – **Companies with a concrete strategy in place to reduce their carbon footprint**

Q15 What actions is your company undertaking to be become climate neutral? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<50)

	Generally reducing carbon emissions of your company	Adopting/purchasing new technological solutions to reduce emissions	Developing new technological solutions to reduce emissions	Offsetting carbon emissions by purchasing carbon credits or funding an equivalent carbon saving elsewhere	Other (spontaneous)	None (spontaneous)	Don't know/No answer
EU27	53	47	35	10	4	8	3
UK	64	46	30	37	0	0	1
IS	60	29	25	31	2	0	18
NO	65	62	36	16	7	6	0
CH	70	57	41	17	4	4	2
ME	20	27	19	0	0	34	0
MD	50	45	31	26	13	26	0
MK	39	39	35	8	8	21	5
AL	24	44	4	0	0	33	0
RS	31	37	41	23	0	6	1
TR	68	64	63	28	0	10	0
US	79	57	33	19	0	9	0

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=3 083 (EU SMEs) & n=846 (SMEs in non-EU countries) – **Companies with a concrete strategy in place to reduce their carbon footprint**

N2 Does your company use recycled materials in your products? If yes, what is the share of recycled materials in your products/production?

	No recycled materials are being used	Less than 5%	Between 5%-19%	Between 20%-49%	Between 50%-74%	75% and more	Don't know/No answer
EU27	39	22	19	9	3	3	6
BE	34	22	24	12	2	1	6
BG	47	14	13	6	8	3	10
CZ	45	20	17	9	5	2	3
DK	42	12	15	11	2	3	14
DE	35	21	18	12	2	2	10
EE	49	23	13	7	3	2	3
IE	37	25	25	11	1	0	1
EL	44	18	18	12	2	3	3
ES	28	22	19	12	3	9	6
FR	31	24	16	11	5	4	9
HR	41	22	13	7	1	3	13
IT	42	31	22	3	0	0	1
CY	48	23	19	7	2	0	2
LV	51	15	15	5	1	2	12
LT	49	19	14	3	6	1	10
LU	47	5	32	14	1	1	1
HU	77	9	5	2	1	2	5
MT	48	23	22	7	0	0	0
NL	33	8	35	19	4	1	1
AT	45	15	17	18	2	2	2
PL	45	18	15	8	3	3	7
PT	38	41	13	3	1	3	2
RO	62	16	14	2	3	2	2
SI	29	27	27	6	5	1	5
SK	29	29	20	7	4	3	9
FI	30	18	16	8	7	6	15
SE	34	13	24	7	7	5	10

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%, EU27) Base: n=8 194 (EU SMEs) – **Companies selling products**

N2 Does your company use recycled materials in your products? If yes, what is the share of recycled materials in your products/production?

	No recycled materials are being used	Less than 5%	Between 5%-19%	Between 20%-49%	Between 50%-74%	75% and more	Don't know/No answer
EU27	39	22	19	9	3	3	6
UK	35	29	17	14	3	2	0
IS	29	28	15	6	1	0	21
NO	25	24	29	6	3	3	12
CH	34	19	14	8	2	5	18
ME	65	3	11	8	6	6	2
MD	45	10	18	13	3	3	9
MK	62	19	5	5	1	3	5
AL	57	29	1	1	5	8	0
RS	59	19	10	7	1	1	3
TR	55	23	11	7	0	2	2
US	43	18	13	9	6	4	7

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=8 194 (EU SMEs) & n=2 491 (SMEs in non-EU countries) – **Companies selling products**

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

	Yes, for all of your products	Yes, but only for some of your products	No	Don't know/No answer
EU27	22	25	52	2
BE	20	29	49	2
BG	23	21	54	1
CZ	28	28	43	1
DK	23	17	57	4
DE	9	14	76	1
EE	31	20	48	1
IE	17	25	55	2
EL	25	13	62	0
ES	30	28	40	1
FR	20	28	50	2
HR	21	19	57	4
IT	21	26	53	0
CY	13	15	72	0
LV	21	18	51	10
LT	34	16	49	1
LU	22	23	54	0
HU	16	18	62	5
MT	20	18	62	0
NL	24	32	42	2
AT	19	31	48	3
PL	24	18	54	4
PT	28	45	27	0
RO	28	29	42	1
SI	40	22	39	0
SK	20	19	59	2
FI	40	24	32	4
SE	31	16	51	2

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%, EU27) Base: n=8 194 (EU SMEs) – **Companies selling products**

N3 Does your company have an explicit policy to extend the life span of your products (e.g. choosing durable materials, dedicated repair services for customers etc.)?

	Yes, for all of your products	Yes, but only for some of your products	No	Don't know/No answer
EU27	22	25	52	2
UK	11	34	55	0
IS	30	14	40	17
NO	28	36	33	3
CH	24	14	53	9
ME	25	30	43	2
MD	18	12	65	5
MK	26	18	53	3
AL	29	12	48	11
RS	26	27	46	0
TR	18	32	48	1
US	22	25	49	4

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=8 194 (EU SMEs) & n=2 491 (SMEs in non-EU countries) – **Companies selling products**

Q9 Does your company offer green products or services?

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
EU27	32=	12▲1	52▼-2	4▲1
BE	34▼-1	10▼-3	53▲8	4▼-4
BG	22▼-1	16▲5	58▼-6	4▲2
CZ	23▲4	11▲3	64▼-8	2▲1
DK	40▲3	6▲3	49▼-4	5▼-1
DE	34▲4	6▼-4	57▼-1	3▲1
EE	21▼-6	8▼-1	70▲12	1▼-5
IE	32▲3	28=	34▼-3	7=
EL	39▲3	20▼-5	41▲3	0=
ES	35▲3	12▲2	50▼-6	4▲1
FR	37▼-1	15▲5	43▼-8	5▲3
HR	22▼-5	9▼-9	61▲16	8▼-3
IT	28=	16▲4	53▼-5	3▲1
CY	17▼-15	11▼-7	72▲23	1▼-1
LV	26▲4	4▼-8	65▲2	6▲2
LT	28▼-3	9▼-2	61▲7	3▼-2
LU	40=	10▼-2	48▲2	2=
HU	16▼-6	7▼-3	74▲11	3▼-2
MT	32▲3	10▼-1	56▼-2	2▼-1
NL	46▲1	3▼-2	46▼-1	5▲3
AT	42▼-2	5▼-5	50▲6	3▲2
PL	26=	11▲2	58▼-4	6▲2
PT	26▼-1	19▼-2	37▲4	18▼-1
RO	18▼-5	22▼-8	56▲13	4▲1
SI	35▼-2	8▼-1	57▲4	1▼-1
SK	36▼-5	13=	48▲4	4▲1
FI	35▼-6	5▼-3	56▲6	5▲3
SE	35▼-8	8▲3	53▲6	4▼-1

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q9 Does your company offer green products or services?

	Yes	No, but you are planning to do so in the next 2 years	No and you are not planning to do so	Don't know/No answer
EU27	32	12	52	4
UK	30	15	48	8
IS	32	7	46	16
NO	52	10	34	4
CH	43	5	45	6
ME	27	8	64	0
MD	39	14	43	4
MK	25	12	55	8
AL	22	3	75	0
RS	24	18	56	1
TR	13	11	72	4
US	35	9	52	4

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

	Up to 5%	6-10%	11-30%	31-50%	51-75%	More than 75%	Don't know/No answer
EU27	32▲2	12▼-2	15▲2	7=	6▼-1	18▲1	11▼-2
BE	29▼-8	17▼-1	18▲7	5▲2	9▲2	7▼-10	15▲7
BG	27▼-17	16▲3	15▲6	11▲8	1▼-4	16▲3	14▲2
CZ	32▼-14	17▲11	15=	12▲4	3▼-10	18▲9	3▼-1
DK	11▼-5	9▲3	11▼-4	10▲4	2=	30▼-2	27▲4
DE	22=	11▼-3	19▲5	7▼-2	11▲3	14▼-10	16▲6
EE	23▼-2	6▼-4	23▲11	8▼-5	7▲3	27▲3	6▼-6
IE	32▲5	19▼-3	10▼-4	7▲4	3▼-4	13▲4	17▼-3
EL	23▲4	15▲1	25▲9	7=	4▼-9	25▲1	1▼-5
ES	32▲3	16▼-8	12▼-2	7▼-2	5▲1	15▲6	12▲3
FR	37▲11	12▲2	13=	6▼-4	6=	16▲7	10▼-16
HR	20▼-16	17▲3	16▲4	16▲6	6▼-6	20▲9	6▼-1
IT	42▲7	12▼-2	11▼-2	0=	0▼-5	25▲5	10▼-3
CY	25▲2	23▲7	23▼-1	1▼-5	12▲10	15▼-6	0▼-7
LV	32▲4	4▼-7	13▲3	14▲3	2▼-5	25▲1	11▲1
LT	36▲11	8▼-13	14▲4	8▼-1	9=	18▼-1	6▼-1
LU	33▲1	24=	13▲5	0=	2=	2▼-8	26▲2
HU	36▼-9	7▼-5	16▼-4	10▲8	2▼-3	18▲8	12▲5
MT	37▲3	23▲4	14▲1	0▼-3	7▼-2	14▲1	4▼-4
NL	33▲6	1▼-6	24▲8	5▼-3	6▲1	26=	5▼-6
AT	29▲4	16▼-5	5▼-2	5▼-3	16▲8	19=	10▼-4
PL	30▼-4	8=	19▲1	10▲4	4▲2	9▼-8	20▲5
PT	25▲5	24▲1	5▼-4	10▲3	4=	25▼-3	7▼-2
RO	43▲1	19▲7	20▲9	5▼-1	6▲2	6▼-13	2▼-6
SI	17▼-24	12▼-3	23▲10	15▲8	11▲8	12▼-5	10▲6
SK	18▼-12	19▲5	19▲4	10▲3	12▲4	13▼-5	8▲1
FI	23▼-4	7▼-9	17▲1	20▲8	6▼-3	19▲1	9▲6
SE	25=	13▲4	8▼-5	12▲2	6▼-3	24▲4	12▼-3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%, EU27) Base: n=4 280 (EU SMEs) – **Companies offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q10 How much did these green products or services represent in your annual turnover of the latest available fiscal year?

	Up to 5%	6-10%	11-30%	31-50%	51-75%	More than 75%	Don't know/No answer
EU27	32	12	15	7	6	18	11
UK	19	5	14	8	6	31	17
IS	18	18	16	11	4	13	20
NO	24	25	19	13	5	11	4
CH	26	8	16	5	6	20	19
ME	15	49	16	0	5	10	5
MD	49	2	4	5	1	13	26
MK	39	24	9	2	3	7	16
AL	53	1	31	1	0	12	1
RS	33	18	17	4	6	16	7
TR	49	23	11	4	11	1	1
US	34	17	11	8	5	7	19

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=4 280 (EU SMEs) & n=2 300 (SMEs in non-EU countries) – **Companies offering green products or services**

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	60▼-2	57▲1	25▲1	2=	6▼-1
BE	65▼-2	55▼-2	38▲12	1▼-3	13▲8
BG	49▼-21	48▼-4	28▲12	10▲5	6▲3
CZ	65▼-7	70▼-9	25▼-7	5▲5	2▼-2
DK	43▲4	50▼-7	33▲5	7▲3	10▼-2
DE	59=	70▲5	17▼-8	3▼-1	11▲7
EE	77▼-2	67▼-4	14▲5	4▲1	3▼-6
IE	60▼-2	28▼-4	33▲7	1▼-4	3=
EL	68▼-5	54▲3	25▲11	0▼-3	2▲1
ES	63▼-8	55▼-11	40▲3	4▲4	2▼-2
FR	51▲6	42▲5	23▼-3	0▼-3	7▼-9
HR	72=	38▼-26	9▼-10	2▼-3	10▲5
IT	58▲5	72▲6	27=	0=	1▼-2
CY	63▲6	37▼-18	27▲10	8▲5	4▼-3
LV	63▼-15	45▲1	8▼-5	1=	9▲9
LT	81▲12	72▲28	28▲18	1▼-6	0▼-3
LU	53▼-1	45▲9	17▼-9	2▼-6	12▲2
HU	55▼-14	62▲14	12▼-15	5▲2	9▲2
MT	63▲3	48▲10	15▼-5	11▲4	9▼-4
NL	65=	53▲3	26▲6	1=	4▼-4
AT	67▼-2	69▼-2	44▼-3	0▼-5	5▲1
PL	53▼-19	58▲1	7▼-1	3▲3	17▲10
PT	56▼-6	41▲1	11▲6	0▼-1	15▲3
RO	84▼-5	41▼-21	16▲6	1▼-2	4▲4
SI	70▲3	82▲26	27▲10	1▼-1	2▼-2
SK	84▲4	74▲8	20▼-4	1▲1	2▼-5
FI	60▼-5	51▼-20	30▲8	1▼-1	4▲1
SE	58▲5	60▲13	33▲5	1▼-2	9▼-1

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%, EU27) Base: n=4 280 (EU SMEs) – **Companies offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

Q13 What type of support does your company rely on for the production of its green products or services? [MULTIPLE ANSWERS]

	Its own financial resources	Its own technical expertise	External support	Other (spontaneous)	Don't know/No answer
EU27	60	57	25	2	6
UK	51	51	36	4	10
IS	45	49	16	9	15
NO	63	48	22	3	7
CH	63	58	33	2	6
ME	46	27	54	0	0
MD	80	18	21	0	2
MK	70	34	17	1	5
AL	73	16	14	0	0
RS	70	40	18	3	3
TR	75	43	7	0	0
US	62	41	36	1	8

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=4 280 (EU SMEs) & n=2 300 (SMEs in non-EU countries) – **Companies offering green products or services**

DX1 Which type of external support does your company get for the production of its green products or services? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<100)

	Public funding such as grants, guarantees or loans	Private funding from a bank, investment company or venture capital fund	Private funding from friends or relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other (spontaneous)	Don't know/No answer
EU27	19	18	12	19	31	30	41	10	5
BE	28	20	9	36	50	39	40	2	9
BG	12	23	7	9	37	10	53	13	11
CZ	46	24	18	36	55	53	72	0	3
DK	11	8	1	10	36	55	53	17	3
DE	13	16	20	31	17	39	64	14	2
EE	79	4	1	31	69	37	38	9	3
IE	10	42	2	37	17	71	26	12	3
EL	34	19	3	6	19	36	49	14	0
ES	17	23	6	8	47	42	42	5	4
FR	9	5	16	5	30	33	40	10	15
HR	29	21	13	17	9	18	36	30	3
IT	13	21	20	21	25	8	13	12	0
CY	0	21	35	0	4	0	18	35	9
LV	32	35	0	21	18	20	43	2	5
LT	60	31	32	33	18	47	52	0	0
LU	27	25	0	21	27	50	11	6	0
HU	21	5	13	31	31	5	63	1	16
MT	41	12	34	2	0	0	0	2	15
NL	29	3	10	35	13	4	50	20	0
AT	18	30	4	35	32	46	6	6	1
PL	5	16	0	0	29	2	58	23	1
PT	0	81	1	31	34	5	0	0	0
RO	16	39	35	1	26	27	60	17	1
SI	20	8	3	2	9	15	63	14	1
SK	17	22	20	18	30	37	48	7	12
FI	21	16	11	32	29	51	55	3	5
SE	31	25	0	16	42	40	60	4	9

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=1 150 (EU SMEs) – **Companies relying on external support for the production of their green products or services**

DX1 Which type of external support does your company get for the production of its green products or services? [MULTIPLE ANSWERS]
Caution: small base size in many countries (n<50)

	Public funding such as grants, guarantees or loans	Private funding from a bank, investment company or venture capital fund	Private funding from friends or relatives	Advice or other non-financial assistance from public administration	Advice or other non-financial assistance from private consulting and audit companies	Advice or other non-financial assistance from business associations and clusters	Advice or other non-financial assistance from supply chain partners	Other (spontaneous)	Don't know/No answer
EU27	19	18	12	19	31	30	41	10	5
UK	7	7	11	21	45	8	50	1	3
IS	1	14	0	42	16	15	29	1	25
NO	28	21	7	26	10	25	37	4	16
CH	18	20	10	27	31	32	51	8	2
ME	0	19	0	0	0	43	19	1	37
MD	2	27	0	10	2	10	12	33	28
MK	13	8	10	12	7	31	29	14	14
AL	1	12	0	2	4	86	4	0	1
RS	26	16	1	7	17	1	33	8	1
TR	4	7	85	82	80	4	85	0	0
US	18	15	14	25	37	57	67	8	11

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=1 150 (EU SMEs) & n=349 (SMEs in non-EU countries) – **Companies relying on external support for the production of their green products or services**

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know /No answer
EU27	42▼-1	29▲2	26▼-3	27▲4	4▲1	13=	5▼-1
BE	33▲5	34▲5	35▲1	29▼-3	2▼-4	24▲12	1▼-6
BG	63▲9	14▼-7	21▲9	31▲5	6▲3	6▼-5	4▼-3
CZ	36▲4	37▲12	30=	34▲11	2▼-2	10▼-6	2▲2
DK	41▲15	25▲6	25=	17=	5▲3	13▼-8	9▼-4
DE	38▼-1	26▼-3	23▼-7	27▲5	7▲5	19▼-2	4▲3
EE	44▲1	28▲9	32▲9	22▼-2	2▼-4	17▲1	1▼-5
IE	52▲8	32▼-1	30▲8	13▼-5	1▼-1	3▼-3	12▼-3
EL	71▲12	34▼-9	24▼-9	27▲4	1▲1	7▲5	0▼-1
ES	52▼-5	41▼-2	32▼-10	30▲9	2▲2	8▲3	0▼-2
FR	35▲10	32▲10	26▼-5	27▲9	2=	15▼-1	5▼-5
HR	60▼-4	18▲8	33=	17▼-3	0▼-4	13▲8	1▼-2
IT	42▼-6	18=	16▲3	29▲3	6▲1	8▼-3	12=
CY	42▼-28	50▲16	29▲3	37▲6	0=	6▲2	0▼-2
LV	46▼-2	12▼-12	17=	22▼-3	7▲6	13▼-1	5▲1
LT	75▲17	18▼-3	30▲6	36▲19	0▼-2	9▼-5	0▼-1
LU	27▼-10	31▲1	20▼-12	36▲3	6▲4	12▲4	9▲4
HU	44=	19▲3	35▲21	17▼-10	0▼-2	15▼-2	0▼-9
MT	47=	14▼-6	26▲1	39▲7	8▲1	16▼-2	2▲2
NL	33▼-3	23▲1	18▼-7	26=	5▲4	22▼-1	6=
AT	41▼-2	32▲2	39▲12	21▼-5	0▼-1	11▼-7	5=
PL	37▼-14	30▲8	23▼-9	19▲6	4▲3	16▲1	10▲4
PT	31▼-4	24▼-1	21▼-7	29▲5	4▼-1	11▲1	0▼-1
RO	50▼-11	28▼-3	35▲11	39▼-1	0▼-2	6▼-3	0▼-1
SI	54▼-11	10▼-12	27▲8	16▼-2	1▼-3	15▲8	0▼-2
SK	46▼-15	38▲7	29▲2	25▲4	0▼-1	12▲2	1=
FI	47=	24▼-3	33▲6	25▲5	4▲2	12▼-2	1▲1
SE	39▲3	30▲1	43▲7	14▼-5	3▲2	12▼-5	4▲2

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%, EU27) Base: n=4 280 (EU SMEs) – **Companies offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

DX3 What type of support would help you the most to expand your range of green products or services? [MULTIPLE ANSWERS]

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know /No answer
EU27	42	29	26	27	4	13	5
UK	39	17	35	19	0	25	3
IS	47	22	36	26	2	9	7
NO	44	30	26	20	0	8	9
CH	37	28	27	26	3	17	7
ME	72	13	16	37	0	0	0
MD	32	8	20	22	0	21	18
MK	56	18	21	22	2	10	5
AL	26	1	16	47	0	12	1
RS	52	30	25	29	0	6	3
TR	56	30	26	26	0	11	0
US	42	28	33	17	1	20	3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=4 280 (EU SMEs) & n=2 300 (SMEs in non-EU countries) – **Companies offering green products or services**

DX4 What type of support would help you the most to launch your range of green products or services ? [MULTIPLE ANSWERS]

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know /No answer
EU27	34▲3	18=	22▲3	13▼-1	3▲1	36▼-4	3▼-1
BE	22▼-6	21▼-3	22▼-9	17▲5	0▼-1	46▲13	1=
BG	43▲12	18▲6	23▲8	19▲5	2▲1	29▼-4	3▼-6
CZ	28▲2	20▲3	21▲4	17▲2	0▼-2	40▼-5	1▼-2
DK	13▼-6	15▲2	23▲9	12▲5	2=	48▼-1	8=
DE	33▲10	21▼-1	16▼-3	13▼-5	4▲2	42▼-2	1▼-3
EE	33▲4	18▼-1	23▲12	16▲6	2▲1	29▼-19	2=
IE	43▲1	28▲6	22=	21▼-1	1▼-4	17=	3▼-1
EL	55▲4	21▼-8	27▼-2	15▼-8	1▲1	25▲7	0▼-1
ES	39▼-5	27▼-4	40▲12	16▲6	3▲2	19▼-6	4▼-1
FR	27▲7	18▼-2	28▲16	13▼-3	2=	25▼-22	7▲3
HR	47▼-1	9▼-2	20▲1	9▼-2	1▼-1	30=	5▲2
IT	34▲6	5▼-2	12▼-1	4▼-5	7▲3	53▲1	2▼-2
CY	38▼-10	14▼-6	22▲6	16▲5	0=	41▲5	2=
LV	32▼-13	9▼-9	9▼-9	13▼-2	1=	44▲17	5▲5
LT	60▲19	16▼-3	24▲4	22▲8	0▼-1	27▼-5	0=
LU	18▼-5	15▼-6	16▼-7	11▼-3	3▼-4	53▲9	1▼-1
HU	33▼-6	9▼-4	15▼-7	5▼-8	1▲1	52▲15	2=
MT	11▼-6	0▼-4	10▼-4	12▲4	4▲1	64▲2	12▲2
NL	11▼-2	18▲2	23▲6	16=	0=	47=	6▼-1
AT	39▲5	18▼-1	22▲6	32▲4	2=	23▼-14	4▲1
PL	44▲11	14▲4	21▲4	10▼-4	0▼-2	39▼-4	3▼-2
PT	26▼-14	22▲4	20▼-7	18▲5	8▲3	23▲6	4▼-4
RO	48▼-6	31▲2	32▲1	23▼-6	1▲1	14=	2=
SI	41=	13▼-1	14▼-6	10▼-1	6▲3	37▼-3	2▲2
SK	38▼-1	27▲1	21▼-1	21▲8	0▼-2	27▼-2	1▼-3
FI	33▼-1	23▲9	18▼-2	12▲2	1▼-1	34▼-2	2▼-3
SE	34▲1	27▲1	18▼-8	12▼-2	1▲1	32▲1	6▲2

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=8 307 (EU SMEs) – **Companies not offering green products or services**
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

DX4 What type of support would help you the most to launch your range of green products or services ? [MULTIPLE ANSWERS]

	Financial incentives for developing products, services or new production processes	Assistance with identifying potential markets or customers	Technical support and consultancy for the development of products, services and production processes	Consultancy services for marketing or distribution	Other (spontaneous)	None (spontaneous)	Don't know/ No answer
EU27	34	18	22	13	3	36	3
UK	44	23	20	18	2	30	3
IS	46	17	15	18	0	27	11
NO	38	17	28	12	4	26	4
CH	28	16	24	13	1	42	10
ME	50	15	30	14	0	14	1
MD	11	13	19	20	11	45	0
MK	31	9	15	16	4	39	5
AL	19	13	10	11	0	46	13
RS	47	26	17	6	0	25	4
TR	34	25	24	14	0	31	3
US	33	19	19	13	0	40	3

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=8 307 (EU SMEs) & n=2 300 (SMEs in non-EU countries) – **Companies not offering green products or services**

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time?

	0 employees	1-5 employees	6-9 employees	10+ employees	Don't know/No answer
EU27	57=	34▲1	3▼-1	1=	5=
BE	74▲4	20▼-3	3▲1	0=	3▼-1
BG	53▼-7	38▲7	4▲1	1▼-1	5=
CZ	58=	32▼-4	5▲3	1=	4▲2
DK	60▼-3	30▲2	5▲3	1▼-1	5▼-2
DE	61▼-5	30▲6	2▼-2	3=	4▲1
EE	75▲4	19▼-4	1▼-1	1▼-1	6▲1
IE	60▲5	23▼-2	2▼-1	1▼-2	15▼-1
EL	62▲1	35▲3	2▼-4	0=	1▼-1
ES	48▼-10	45▲8	3=	1=	4▲2
FR	62▼-5	29▲10	4▼-1	1=	5▼-4
HR	55▲10	30▼-13	5▼-2	1▼-1	9▲5
IT	48▲3	45▼-4	1=	1=	6▲1
CY	90▲16	10▼-14	0▼-1	1=	0=
LV	56▲13	30▼-16	5▲3	2=	7=
LT	71▲8	25▼-4	3▼-1	1▼-1	1▼-3
LU	57▲6	32▼-6	0▼-1	0▼-2	11▲2
HU	83▲14	10▼-11	3▲1	0=	4▼-3
MT	85▲5	14▼-3	1=	0▼-1	0▼-1
NL	66▲6	28▼-2	2▼-1	0▼-1	5▼-1
AT	57▲1	33▲2	2=	1▼-1	7▼-2
PL	57▼-4	29▲3	2▼-1	1▼-1	12▲3
PT	53▲2	37▲2	0▼-3	0▼-2	10▲1
RO	47▼-2	44▲9	3▼-1	2▼-3	4▼-3
SI	68▲12	24▼-16	5▲3	1=	1▲1
SK	44▲10	47▼-11	5▲1	1=	2=
FI	60▲5	36▼-1	2▼-2	1▼-1	1▼-1
SE	52=	39▲2	5▼-1	1=	3▼-2

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs)
▼▲ Evolution 2024-2021 (comparison with Flash Eurobarometer 498, November-December 2021)

DX5 In your company, how many of your full-time employees, including yourself, work in green jobs some or all of the time?

	0 employees	1-5 employees	6-9 employees	10+ employees	Don't know/No answer
EU27	57	34	3	1	5
UK	69	25	0	1	5
IS	57	17	14	1	12
NO	47	39	7	2	5
CH	61	27	3	3	5
ME	60	28	8	1	3
MD	30	41	15	8	6
MK	68	22	3	2	6
AL	74	21	1	1	4
RS	58	36	3	2	1
TR	83	11	2	1	4
US	57	25	8	4	7

Flash Eurobarometer 549 – SMEs, resource efficiency and green markets / Fieldwork: 3.6.2024-28.6.2024
(%) Base: n=13 124 (EU SMEs) & n=3 783 (SMEs in non-EU countries)

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