

opinionway,

— FOR —

EQUANS

Decarbonisation and climate adaptation SMEs and Mid-sized Industrial companies:

France, United Kingdom, Belgium, Germany,
Netherlands, United States, Canada

Survey report – Wave 2

March 2026





Context & objectives

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Crédits : benjamin-davies

Context & objectives

The 2025 edition of the study on the decarbonisation of industries has been very well received – in the press, by your partners and by your teams.

This visibility has confirmed the value of having an annual benchmark report that enables Equans to present a strong, well-researched and distinctive voice at European level.

With this in mind, we are proposing an enhanced, clarified and expanded edition for 2026, building on the lessons learned from the first wave whilst incorporating new emerging challenges.

Objectives :

1. Expansion of the geographical scope :

The inclusion of the United States and Canada will enhance the barometer by providing a direct comparison between European and North American trends in decarbonisation.

2. Expansion of the questionnaire :

By providing robust answers to the main questions examined, the 2025 barometer has highlighted new topics to explore. The 2026 questionnaire will therefore be expanded to include these additional themes.

3. Clarification of the questionnaire :

The addition of definitions for terminology that may be confusing will improve understanding of the items and thus enhance the accuracy and relevance of the barometer.

“ A study for:



ESTABLISHING AN ANNUAL KEY EVENT

The publication of the barometer for the second consecutive year in a Thema feature in Les Échos helps to establish the barometer as a long-term fixture and makes it a regular event for economic decision-makers focusing on the challenges of industrial decarbonisation.



BRINGING EXPERTS AND MARKET PLAYERS TOGETHER AROUND THE RESULTS

Organise sessions to present the survey results, bringing together experts and industry representatives to share the key findings of the study and open up a discussion on the dynamics of the sector.



STIMULATING DISCUSSION WITHIN THE INDUSTRIAL ECOSYSTEM

The barometer provides insights into perceptions, barriers and drivers of decarbonisation, with a view to informing economic stakeholders and contributing to the debate on industrial transformation.



Methodology

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Methodology

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

“OpinionWay survey for Equans”

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

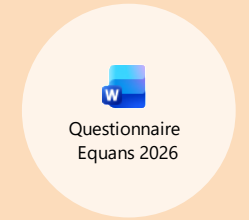


A sample of **1,861 industry decision-makers** involved in decarbonisation-related issues in their company (private-sector companies with 50 to 4999 employees), distributed as follows:

- In Europe (same scope as the study conducted in 2025): 411 respondents from France, 217 from UK, 200 from Germany, 214 from Belgium and 201 from Netherlands.
- In the Americas (new countries surveyed compared to 2025): 418 respondents in the United States and 200 in Canada

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

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



Interviews were conducted from **30 January to 18 February 2026**.

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



The following margins of error must be considered when interpreting the results of this survey:

- a maximum of 2.3 points for a sample of 1,800 respondents.
- a maximum of 4.9 points for a sample of 400 respondents.
- a maximum of 6.9 points for a sample of 200 respondents.


Reading note

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

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

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

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

 → significantly higher/lower than the results of the overall results

Significant differences between the March 2025 wave and the March 2026 wave are highlighted by the coloured arrows below (95% significance level), accompanied by a reminder of last year's result **only in the detailed results of European countries**:

▲80% → significantly **higher** than the previous wave

▼90% → significantly **lower** than the previous wave

The figures shown in the report represent the **gross workforce**.



Sample profile

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Profile of the industrial decision-makers

Where is your company located?

The figures presented have been adjusted. Adjustment criteria are marked with an *

* In France: **8%**

* In the United Kingdom : **8%**

* In Belgium : **2%**

* In Germany : **23%**

* In the Netherlands : **3%**

* In the United States : **45%**

* In Canada : **11%**

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
* Number of employees		<i>Basis :</i>						
50 to 99 employees	42%	411	217	214	200	201	418	200
100 to 249 employees	27%	21%	24%	35%	34%	36%	50%	55%
250 to 499 employees	9%	62%	59%	44%	46%	47%	8%	10%
500 to 4,999 employees	22%	7%	4%	9%	8%	6%	10%	12%
* Business Sector		10%	12%	12%	12%	11%	32%	23%
Industry	66%	71%	72%	71%	77%	70%	59%	61%
Construction, building trade	30%	24%	23%	24%	16%	26%	39%	37%
Energy	4%	5%	5%	5%	7%	4%	2%	2%
Extractive industry	7%	3%	8%	8%	5%	13%	11%	2%
Agrifood	7%	13%	2%	21%	8%	10%	6%	7%
High tech	19%	14%	24%	15%	7%	15%	26%	19%
Health and biotech	9%	8%	15%	9%	7%	8%	7%	15%
Chemicals	4%	5%	3%	4%	3%	6%	4%	5%
Transport and logistics	12%	11%	15%	15%	17%	10%	10%	10%
Automotive	9%	7%	8%	6%	12%	6%	5%	19%
Metallurgy	13%	23%	6%	10%	28%	15%	5%	4%
Telecommunications	7%	6%	4%	6%	6%	11%	7%	8%
Another industry sector	13%	10%	14%	6%	7%	6%	19%	11%

Profile of the industrial decision-makers

		Ensemble	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
Role in decarbonisation-related decisions									
			Bases :						
			411	217	214	200	201	418	200
	Main decision-maker	63%	49%	63%	48%	38%	62%	80%	58%
	Co-decision-maker	32%	36%	34%	43%	51%	33%	20%	40%
	Consulted but not decision-maker	5%	15%	3%	9%	11%	5%	<1%	2%
	Not involved in these decisions	-	-	-	-	-	-	-	-
Department									
	CEO/Managing Director/Owner/General Manager	34%	15%	38%	18%	15%	23%	49%	33%
	General management	15%	17%	14%	20%	22%	26%	11%	17%
	Strategic management	9%	9%	7%	15%	8%	9%	10%	8%
	CSR department	3%	7%	1%	6%	5%	4%	2%	4%
	Administrative and financial department	4%	7%	6%	10%	5%	7%	1%	2%
	Plant management	4%	6%	3%	2%	4%	3%	2%	9%
	Department of operations	9%	13%	5%	9%	13%	7%	7%	9%
	Logistics/supply chain department	3%	6%	4%	7%	6%	5%	1%	1%
	IT department	9%	6%	5%	4%	9%	6%	12%	7%
	Safety/QHSE department	3%	3%	7%	1%	2%	4%	3%	3%
	Purchasing department	1%	2%	<1%	2%	<1%	2%	<1%	1%
	Technology / R&D	3%	3%	4%	2%	6%	3%	1%	1%
	Industrial maintenance department	2%	3%	1%	4%	4%	1%	<1%	2%
	Legal/compliance department	<1%	<1%	-	-	-	<1%	<1%	-
	Human resources department	1%	2%	5%	<1%	<1%	<1%	1%	3%
	Other	<1%	1%	-	-	1%	<1%	-	-



Findings

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01



Perception of
industrial
decarbonisation



Definition of decarbonisation

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

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

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



Despite negative external factors, industrial companies still believe that the sector is trying to reduce the impact of its CO₂ emissions, an opinion widely shared in 2026. Perceptions in Belgium and the Netherlands, less optimistic this year, are approaching the European average, while Anglo-Saxons seem to be more confident.

Q1: To what extent do you agree with the following statements?

Basis: all decision-makers (1861)

Today, the industrial sector...

	Completely agree		Total respondents that agree		France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
					Basis:		Basis:		Basis:		Basis:		Basis:		Basis:		Basis:	
					411	217	214	200	201	418	200							
	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree	Completely agree	Total Agree
emits a lot of carbon dioxide (CO ₂)	45%	89%	34%	83%	49%	89%	33%	84%	35%	86%	38%	83%	52%	93%	40%	82%		
							▲21%											
pays close attention to its carbon dioxide (CO ₂) emissions	38%	84%	31%	80%	42%	92%	34%	83%	23%	75%	36%	80%	47%	88%	35%	83%		
relies on a circular economy as much as possible	31%	84%	25%	78%	36%	88%	29%	78%	19%	78%	32%	84%	38%	88%	26%	84%		
always favours decarbonised solutions	33%	73%	24%	70%	38%	79%	32%	77%	20%	66%	22%	76%	42%	77%	29%	67%		
												▼92%						
captures a large amount of the carbon dioxide (CO ₂) it emits	33%	73%	23%	72%	38%	80%	34%	78%	22%	70%	29%	70%	42%	74%	24%	71%		

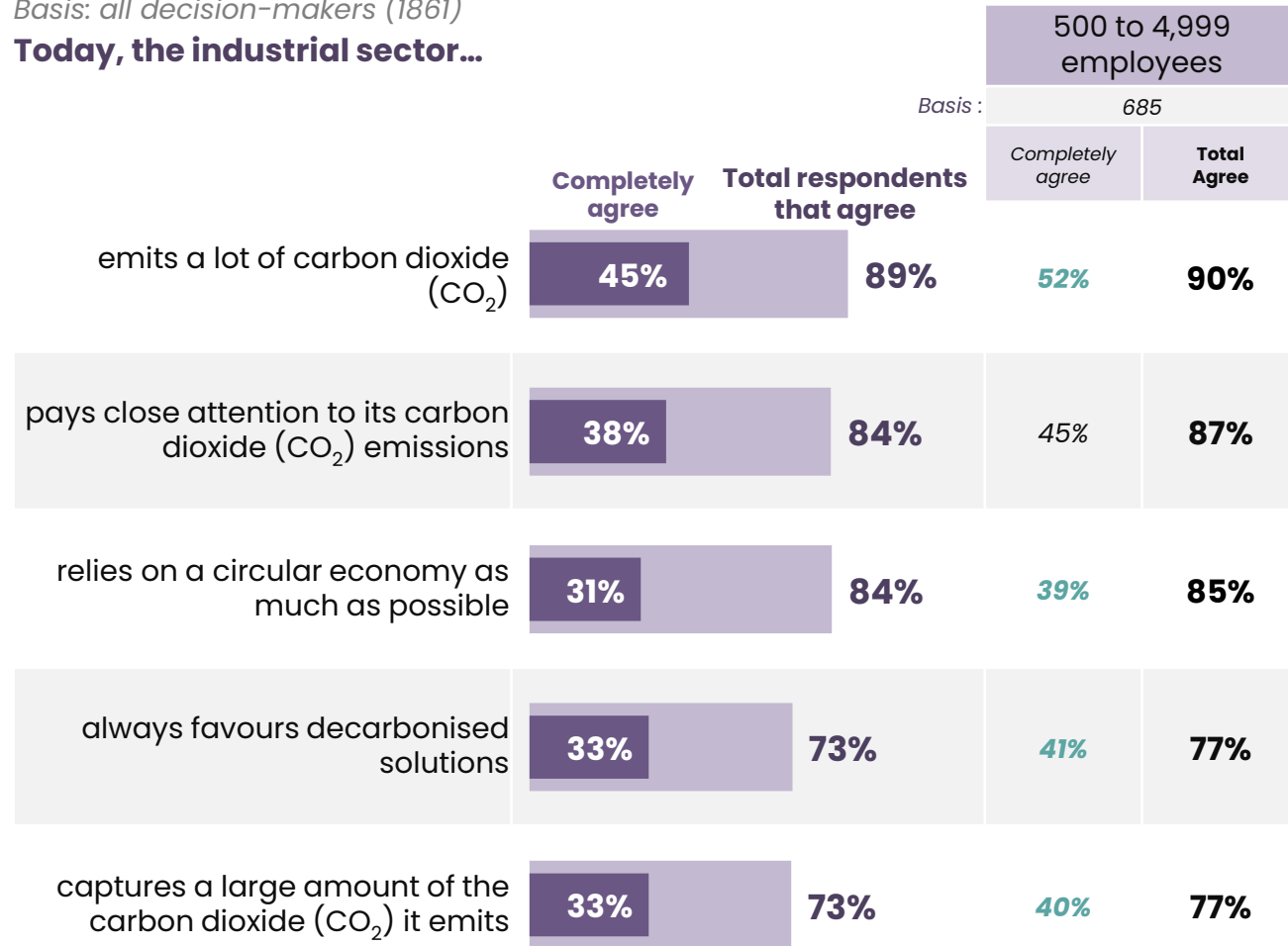


With greater intensity than average, leaders of large mid-sized companies acknowledge the willingness of the industrial sector to initiate the ecological transition.

Q1: To what extent do you agree with the following statements?

Basis: all decision-makers (1861)

Today, the industrial sector...





Despite some reservations in France and Germany, managers still see decarbonisation more as a driving force for transformation and competitiveness for the sector than an environmental emergency, particularly in the United States and the United Kingdom. In Canada, the lack of awareness about solutions seems to be impeding efforts in the sector. The notion of attractiveness stands out more this year in the Netherlands, as does performance in Belgium and Germany.

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

Basis: all decision-makers (1861)

Decarbonising industry...

	Basis :		France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
			411		217		214		200		201		418		200	
			Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree
is necessary to respond to the climate emergency	62%	94%	50%	93%	69%	95%	53%	94%	51%	93%	49%	88%	69%	95%	62%	91%
drives companies in the sector to innovate more	52%	93%	45%	92%	55%	96%	45%	88%	39%	92%	47%	90%	63%	94%	41%	93%
improves the sector's appeal	48%	93%	33%	90%	57%	98%	42%	91%	34%	90%	52% ▲38%	91%	56%	94%	48%	94%
is possible because the applicable solutions are known	44%	91%	31%	90%	48%	94%	32%	86%	31%	91%	41%	86%	56%	93%	27%	84%
boosts the sector's independence with respect to other countries	45%	90%	32%	85%	56%	97%	37%	85%	33%	83%	42%	85%	52%	94%	42%	89%
improves the performance of industry	47%	88%	31%	83%	60%	93%	40%	85% ▲75%	36%	83% ▲74%	44%	86%	57%	91%	37%	90%
is a step that is already well underway	39%	85%	27%	79%	45%	90%	32%	83%	19%	74%	32%	85%	53%	93%	30%	76%



An English and American enthusiasm shared by the biggest medium-sized companies: all are convinced that decarbonisation, a driving force behind independence and performance for the sector, is an achievable goal.

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

Basis: all decision-makers (1861)

Decarbonising industry...

	Completely Agree	Total respondents that agree	Basis : 500 to 4,999 employees 685	
			Completely Agree	Total Agree
is necessary to respond to the climate emergency	62%	94%	66%	96%
drives companies in the sector to innovate more	52%	93%	57%	96%
improves the sector's appeal	48%	93%	55%	96%
is possible because the applicable solutions are known	44%	91%	51%	96%
boosts the sector's independence with respect to other countries	45%	90%	50%	95%
improves the performance of industry	47%	88%	53%	93%
is a step that is already well underway	39%	85%	46%	89%

Opinion of large medium-sized companies, specifically in France and Canada.



In reality, it is taking a long time to implement this. While it is still seen as being more difficult than for other sectors, the United Kingdom is less categorical this year, and its neighbours are following the same trend. The Dutch, amongst the most pessimistic in 2025, are now more in line with the rest of the continent in terms of their view on the tangible and economically-viable nature of decarbonisation.

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

Basis: all decision-makers (1861)

Industrial decarbonisation...

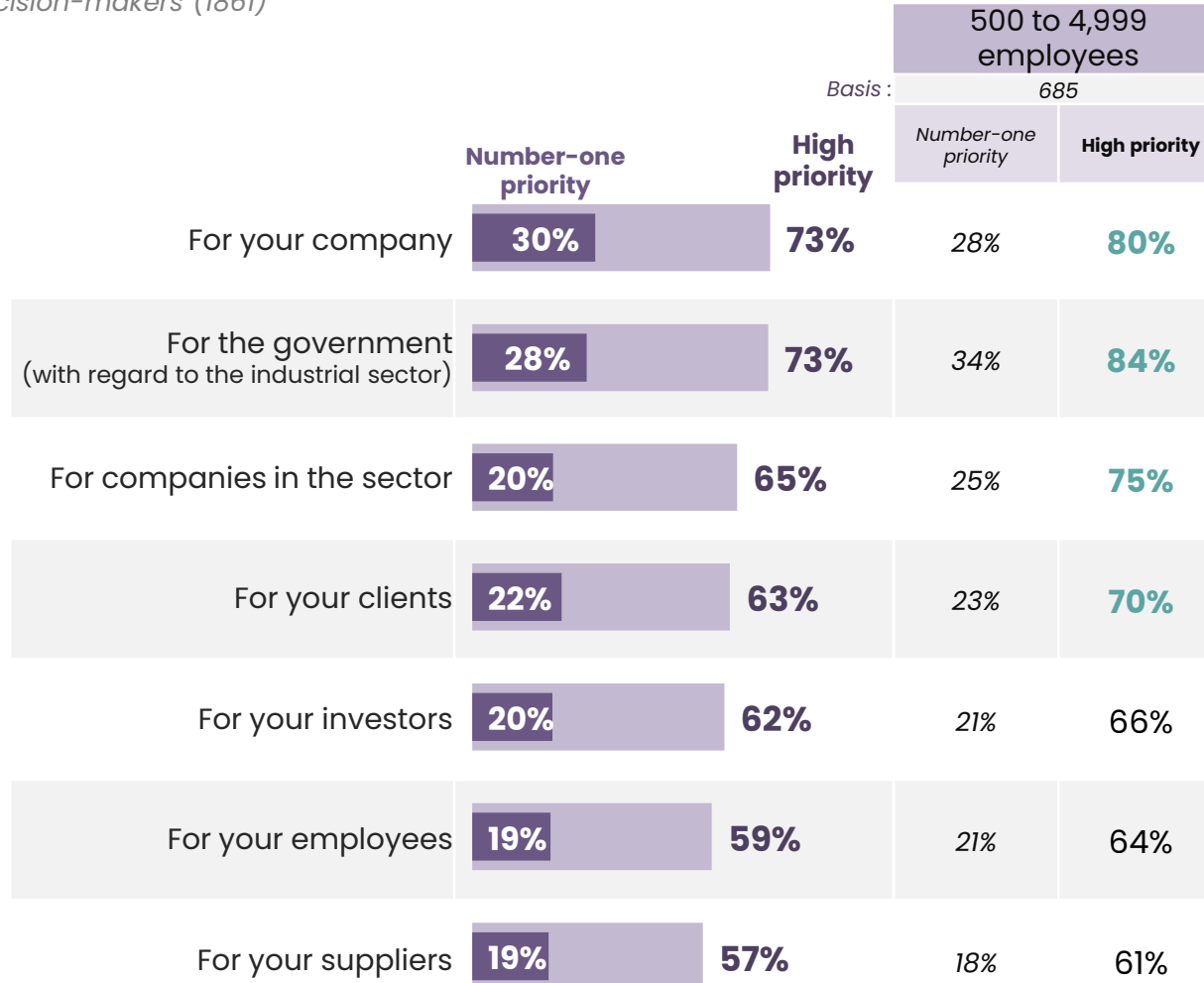
			France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
			Basis: 411		217		214		200		201		418		200	
			Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree
is a long-term project	53%	91%	40%	93%	56%	91%	37%	86%	46%	93%	52%	91%	58%	89%	57%	94%
is harder than decarbonising other sectors	25%	70%	28%	75%	19%	65%	26%	76%	22%	73%	25%	75%	29%	68%	22%	70%
represents too great a financial burden	26%	65%	25%	76%	23%	57%	29%	75%	24%	73%	28%	63%	28%	58%	22%	70%
is a pipe dream	18%	45%	12%	41%	17%	43%	13%	48%	14%	42%	25%	51%	22%	48%	13%	44%
is an issue you are fed up of hearing about	21%	43%	14%	44%	14%	37%	19%	50%	15%	36%	24%	52%	28%	48%	16%	41%



On the contrary, managers of large medium-sized companies see their stakeholders as real allies in industrial decarbonisation, with the State in the forefront, a more frequent opinion here than on average.

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

Basis: all decision-makers (1861)



Opinion of many large medium-sized companies in the United Kingdom and Canada.



For from being a subject that is not frequently spoken about, decarbonisation is a constant strategic issue for companies and their stakeholders. After a high level of enthusiasm last year, this year managers in the Netherlands are taking a more nuanced approach when it comes to the priorities of the state and their clients, bringing them more in line with the norm in Europe.

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

Basis: all decision-makers (1861)

			France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
	Basis :		411		217		214		200		201		418		200	
	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority	Number-one priority	High priority
For your company	30%	73%	28%	74%	35%	75%	33%	77%	24%	65%	29%	71%	36%	80%	18%	60%
For the government (with regard to the industrial sector)	28%	73%	23%	69%	37%	75%	24%	70%	28%	68%	20%	66% ▼81%	29%	78%	26%	65%
For companies in the sector	20%	65%	15%	61%	29%	74%	18%	72%	13%	58%	19%	65%	23%	73%	17%	44%
For your clients	22%	63%	20%	64%	23%	61%	15%	64%	14%	53%	29%	59% ▼74%	26%	71%	24%	59%
For your investors	20%	62%	18%	58%	27%	65%	21%	63%	14%	53%	17% ▼29%	57%	23%	69%	14%	53%
For your employees	19%	59%	20%	64%	21%	61%	20%	60%	11%	46%	21%	56%	23%	68%	18%	41%
For your suppliers	19%	57%	15%	56%	21%	59%	15%	51%	14%	50%	15%	63%	22%	62%	18%	46%

02



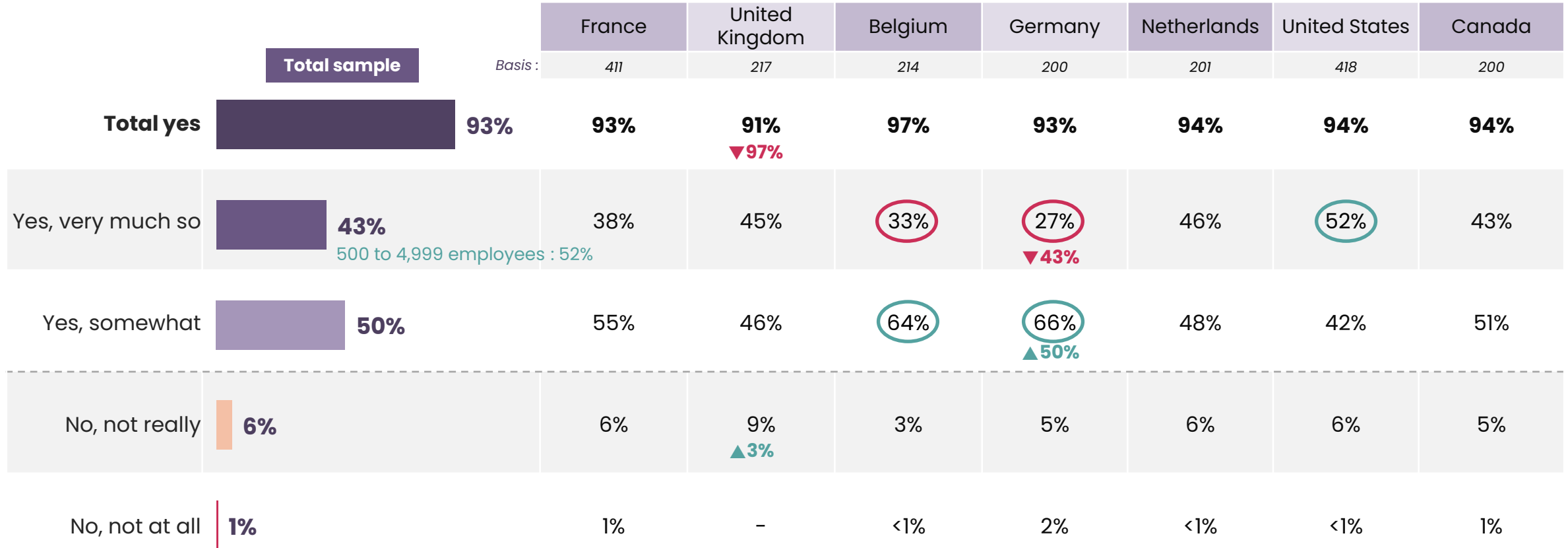
Perception of
decarbonisation
within the
company



There continues to be a consensus on the compatibility of decarbonisation and industrial activities, even in the United States: more than 9 out of 10 managers believe this, although slightly fewer managers in the United Kingdom and Germany share this belief this year.

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

Basis: all decision-makers (1861)





Primarily seen as an advantage for a company's reputation, this year more and more countries are seeing the different advantages of decarbonisation: In France, there is more of a focus on the impacts on HR, while in the Netherlands innovation is seen to be the biggest advantage of decarbonisation, and impact on profitability increases.

Q6 : Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company?

Basis: all decision-makers (1861)

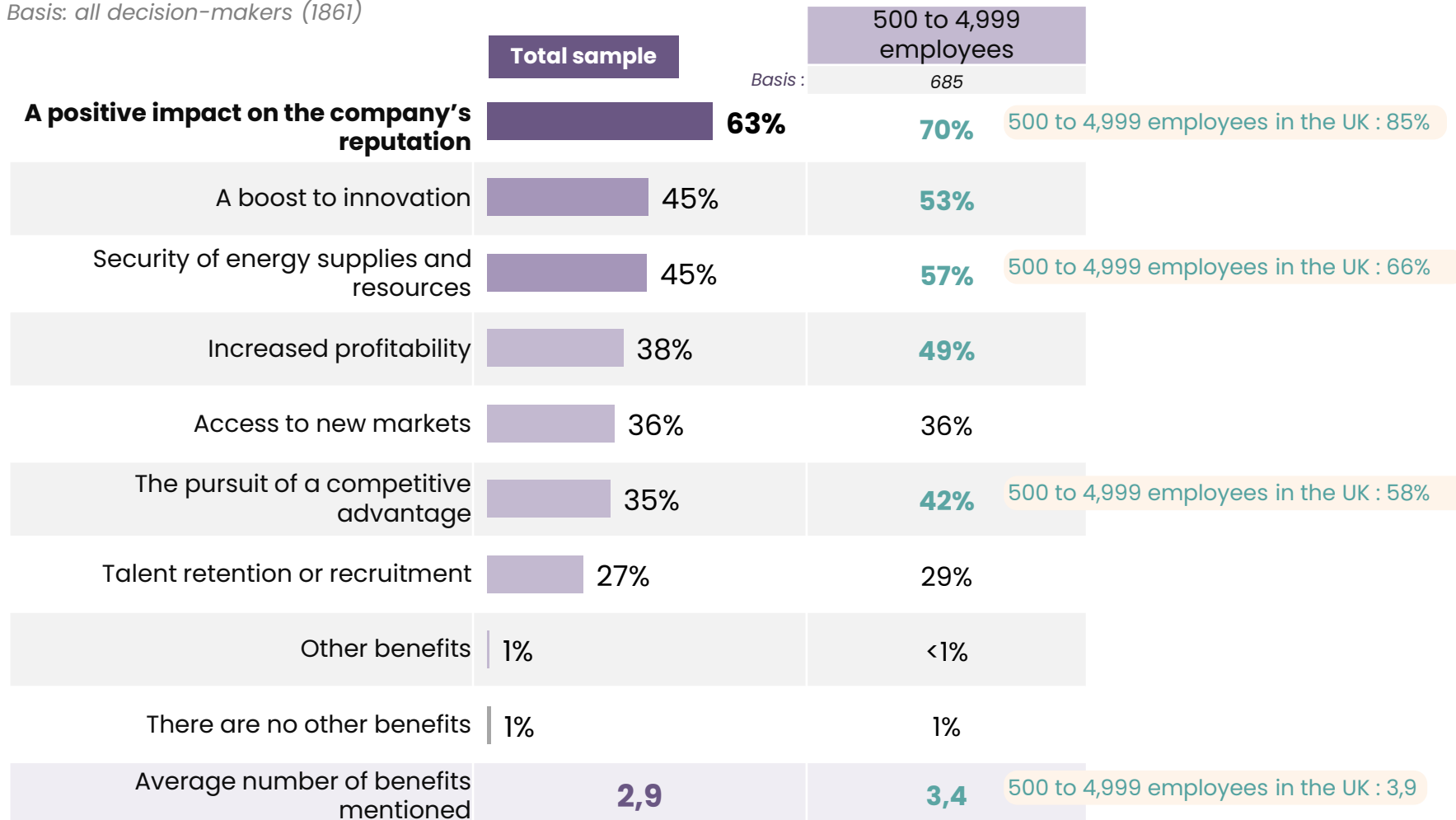
	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
A positive impact on the company's reputation	63%	63%	69%	61%	52%	54%	69%	63%
A boost to innovation	45%	39%	52%	43%	45%	63% ▲40%	44%	45%
Security of energy supplies and resources	45%	35%	47%	36%	40%	46%	51%	38%
Increased profitability	38%	31%	44%	33%	32%	44% ▲31%	43%	30%
Access to new markets	36%	39%	33%	28%	37%	43%	36%	31%
The pursuit of a competitive advantage	35%	30%	35%	33%	34%	31%	36%	35%
Talent retention or recruitment	27%	33% ▲23%	24%	26%	24%	19%	29%	23%
Other benefits	1%	<1%	1%	<1%	-	1%	1%	<1%
There are no other benefits	1%	2%	<1%	1%	1%	2%	<1%	4%
Average number of benefits mentioned	2,9	2,7	3,1	2,6	2,7	3,1 ▲2,6	3,1	2,8



Like managers of Dutch companies, managers of large medium-sized companies seem to have a positive attitude and see more advantages of decarbonisation for their company, particularly in the United Kingdom.

Q6 : Apart from being involved in the green transition and complying with the law, what are, or what would be, **the benefits of decarbonisation** for your company?

Basis: all decision-makers (1861)



Large medium-sized companies on the American continent tend to mention increased profitability more frequently, as well as the stimulation of innovation.



This year in the Netherlands, the scale of the investments required for decarbonisation has more frequently been an obstacle to decarbonisation, the current context in the Netherlands is now comparable to the European experience in general in this area. In the United Kingdom, complexity seems to be less of an issue.

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

Basis: all decision-makers (1861)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 411	217	214	200	201	418	200
The complexity of the proposed solutions	28%	30%	26% ▼39%	33%	32%	26%	24%	34%
The required investments exceeding your company's means	26%	29%	27%	24%	26%	26% ▲14%	25%	28%
The difficulty of finding channels for collecting, recycling and reusing materials that are suited to your needs	26%	19%	21%	22%	23%	21%	30%	28%
The complexity of the supply chain for decarbonised energy or biobased materials	24%	25%	23% ▼38%	24%	23%	30%	23%	24%
A lack of in-house skills for going through with the transition successfully	23%	19%	19%	15% ▼27%	23%	18%	25%	21%
A lack of suitable infrastructure for the energy transition	22%	23%	18%	21%	23%	27%	20%	30%
The administrative and regulatory complexity	22%	25%	29%	25%	22%	19%	18%	30%
The difficulty of assessing the actual risk-benefit ratio of the transformation	19%	19%	20%	22%	18%	12%	19%	22%

500 to 4,999 employees : 30%

500 to 4,999 employees : 30%

500 to 4,999 employees : 29%

500 to 4,999 employees : 26%

Other possible responses on the next slide...



Despite this, Dutch and British stand out from their continental neighbours as more and more managers say that they no longer see any obstacles that stand in the way of decarbonisation. In Germany, the lack of solutions matching business needs has been reduced by half.

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

Basis: all decision-makers (1861)

... Other possible responses on the previous slide

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 411	217	214	200	201	418	200
A fear of jeopardising the quality of products/services	19%	20%	17%	22%	15%	24%	19%	20%
The difficulty of choosing a provider to support you in the process	17%	18%	17%	24%	17%	14%	17%	16%
A lack of support on the part of your funders	17%	21%	15%	16%	18%	19%	14%	23%
The difficulty of getting your teams to follow new models	16%	12%	14%	22%	12%	14%	19%	20%
A lack of solutions for your business needs	16%	16%	14%	19%	12% ▼23%	19%	19%	14%
Resistance to change on the part of your shareholders	16%	13%	14%	16%	14%	13%	17%	20%
A lack of differentiation in the eyes of your clients	14%	14%	13%	9%	19%	16%	12%	11%
Other obstacles	<1%	<1%	-	<1%	-	<1%	1%	-
There are no obstacles	8%	4%	12%▲3%	<1%	2%	12%▲1%	11%	5%
Average number of benefits mentioned	3,3	3,2	3,2	3,2	3,0	3,4	3,4	3,6

” On the other hand, large medium-sized companies identify more obstacles to their decarbonisation: an observation made based on the opinions of Anglo-Saxon companies.

Q7 : And what are, or what would be, **the obstacles to decarbonisation** for your company?
Basis: all decision-makers (1861)





03

Decarbonisation
measures in the
company



Internationally, most companies are still oscillating between their first reflections and first actions. Somewhat behind in 2025, the Netherlands have now rejoined the peloton when it comes to decarbonisation, in a race where the United Kingdom is a close challenger to the United States and Canada brings up the rear. French companies have almost all moved into the reflection phase!

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

Basis: all decision-makers (1861)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 411	217	214	200	201	418	200
Fully operational or in deployment	49%	42%	52%	39%	39%	45% ▲30%	59%	33%
It has completed its decarbonisation	15%	14%	16%	14%	9%	19% ▲2%	21%	6%
It has started to implement decarbonisation measures	34%	28%	36%	25%	30%	26%	38%	27%
It has set itself specific targets	25%	25%	29%	28%	26%	30%	21%	33%
It has started to give it some initial consideration	22%	32%	17%	32%	31%	21% ▼31%	15%	28%
It still hasn't considered the issue	4%	1% ▼5%	2%	1%	4%	4% ▼14%	5%	6%



Managers remain the driving force behind decarbonisation, particularly in the United Kingdom where the state has less of an influence. There is a shift away from the European norm, in France investors are taking on a larger role, while in Germany the dynamic is going the other way.

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

Basis: Decision-makers that have already implemented decarbonisation measures (898)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 184	119	92	83	96	250	74
Your company management	46%	46%	61%	47%	41%	53%	43%	54%
The geopolitical situation	33%	31%	28%	27%	35%	34%	34%	22%
The government	32%	36%	31%	31% ▼54%	40%	44%	27%	39%
The competition	30%	22%	34%	42%	39%	36%	27%	31%
Players already involved in decarbonisation	27%	29%	32%	32%	24%	14%	29%	11%
« Conventional » suppliers (not those already involved in decarbonisation)	27%	24%	20%	37%	21%	28%	31%	17%
Your current or future employees	26%	28%	23%	23%	21%	23%	28%	22%
Your customers or potential customers	23%	26%	23%	15%	19%	25%	23%	26%
Your investors	19%	38% ▲23%	22%	24%	8% ▼30%	27%	20%	15%
Other actors	<1%	<1%	-	-	2%	1%	-	-
Average number of quotes	2,6	2,8	2,7	2,8	2,5	2,9	2,6	2,4

Companies that are already fully operational or in deployment



While management teams remain dominant in larger medium-sized companies, they are mobilising a broader scattering of stakeholders to drive forward decarbonisation, a trend led by American companies.

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

Basis: Decision-makers that have already implemented decarbonisation measures (898)

	Total sample	500 to 4,999 employees
		Basis : 385
Your company management	46%	51%
The geopolitical situation	33%	40%
The government	32%	38%
The competition	30%	45%
Players already involved in decarbonisation	27%	28%
"Conventional" suppliers (not those already involved in decarbonisation)	27%	35%
Your current or future employees	26%	29%
Your customers or potential customers	23%	32%
Your investors	19%	28%
Other actors	<1%	<1%
Average number of quotas	2,6	3,2 500 to 4,999 employees in the USA : 3,4

Companies that are already fully operational or in deployment



Sobriety and resource optimisation are still key when it comes to industrial decarbonisation. Previously ahead in terms of reducing consumption and circularity, Belgians are slowing down this year to meet the general continental pace, putting this solution at the same level as sobriety.

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

Basis: Decision-makers that have already implemented decarbonisation measures (898)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 184	119	92	83	96	250	74
Adopted an energy-efficient and energy-saving approach	60%	55%	63%	51%	53%	55%	64%	49%
Reduced consumption of water and raw materials and improved circularity as much as possible	53%	56%	51%	52% ▼73%	67%	58%	47%	58%
Using carbon capture techniques (at the source or from the air), and storage or sequestration, to reduce emissions*	43%	37%	52%	43%	34%	42%	46%	32%
Replacing fossil fuels with solutions that emit fewer greenhouse gases	41%	42%	44%	48%	33%	43%	43%	45%
Storing and reusing energy in order to limit energy consumption	39%	39%	50%	35%	44%	39%	38%	25%
Average number of types of measures mentioned	2,4	2,3	2,6	2,3	2,3	2,4	2,4	2,1

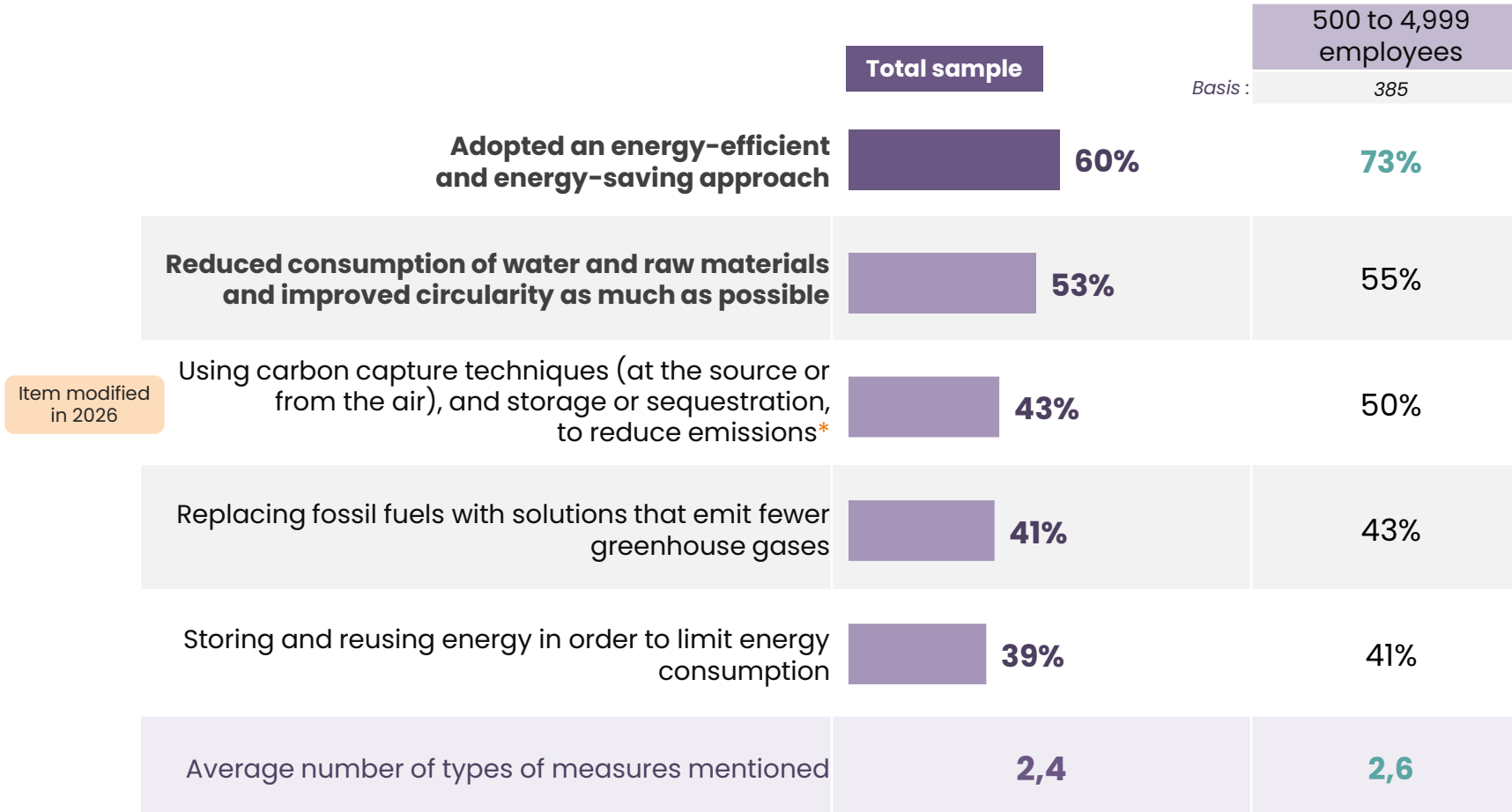
Companies that are already fully operational or in deployment



More active than the average, medium-sized companies have focused on energy efficiency and sobriety.

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

Basis: Decision-makers that have already implemented decarbonisation measures (898)



Item modified in 2026



Solar power and storage dominate in the move away from fossil fuels, America is following the European trend, while the surge in popularity in heat pumps once again confirms their place as the first thermal alternative in most countries. Medium-sized companies are moving forward with a wider range of solutions.

Q9bis: What solution(s) have you chosen to replace all or some of the fossil fuels you use? *Basis: Decisions-makers that have already replaced fossil fuels with solutions that emit fewer greenhouse gases (385)*

			France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
	Total sample	<i>Basis:</i>	80	55	42	34	42	97	35
Total Solutions for renewable energy production	98%		96%	100%	100%	100%	100%	97%	100%
Solar and storage (battery)	90%		83%	96%	85%	97%	80%	90%	78%
Wind	22%		19%	19%	43%	25%	33%	22%	16%
Another renewable energy	8% <small>250 to 499 employees : 21%</small>		4%	2%	6%	3%	18%	8%	29%
Total Use of heat solutions	93%		89%	99%	86%	100%	85%	90%	96%
Heat pump	55%		51%	53%	44%	82%	45%	51%	37%
Electric boiler	33% <small>500 to 4,999 employees : 47%</small>		12%	32%	8%	19%	40%	38%	39%
Waste heat recovery	28% <small>250 to 499 employees : 48%</small>		16%	44%	45%	24%	50%	26%	24%
Geothermal	18%		35%	7%	32%	18%	8%	15%	36%
Hydrogen	18% <small>500 to 4,999 employees : 34%</small>		19%	11%	42%	9%	20%	21%	12%
Another heat solution	3%		3%	2%	2%	-	10%	2%	7%
Electrification of processes	16%		9%	2%	2%	3%	6%	21%	32%
Other solutions	5%		3%	14%	-	8%	4%	2%	8%
Average number of solutions cited	2,9 <small>ISE : 3,6</small>		2,6	2,8	3,1	2,9	3,1	3,0	3,2

Companies that are already fully operational or in deployment



This year, solar power is gaining ground in Europe while geothermal energy is becoming less popular.

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

Basis: Decision-makers that have already replaced fossil fuels with solutions that emit fewer greenhouse gases (385)

	Total sample	Europe
Total Solutions for renewable energy production	98%	99%
Solar and storage (battery)	90%	92% ▲80%
Wind	22%	23%
Another renewable energy	8%	4%
Total Use of heat solutions	93%	96%
Heat pump	55%	64%
Electric boiler	33%	22%
Waste heat recovery	28%	31%
Geothermal	18%	18% ▼35%
Hydrogen	18%	14%
Another heat solution	3%	2%
Electrification of processes	16%	4%
Other solutions	5%	8%
Average number of solutions cited	2,9	2,8

Companies that are already fully operational or in deployment



The United Kingdom is moving ahead in Europe by focusing on process decarbonisation this year, something that French companies are exploring less. At the same time, the Netherlands has firmed up their position as leaders in the electrification of vehicle fleets.

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

Basis: decision-makers that have already implemented decarbonisation measures (898)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis : 184	119	92	83	96	250	74
Reduction of industrial waste, and solutions for collecting, recycling and reusing materials	53%	56%	55%	48%	54%	53%	52%	57%
Decarbonisation of processes: production chain, equipment, recycling and reuse of materials	48%	34%	62% ▲41%	42%	43%	46%	48%	55%
Optimisation of energy management	45%	45%	47%	42%	55%	45%	41%	42%
Optimisation of water management	36%	30%	38%	42%	42%	31%	35%	32%
Use of digital tools for smart management of buildings and processes	35%	26%	49%	31%	21%	30%	39%	39%
Product design: eco-design, use of biobased materials, lifecycle of materials	30%	28%	23%	24%	21%	36%	35%	20%
Searching for common solutions with your suppliers	29%	31%	21%	24%	29%	39%	30%	28%
Insulation and thermal renovation of buildings	29%	28%	32%	34%	37%	30%	27%	15%
Optimisation of the logistics chain	27%	37%	34%	35%	25%	29%	24%	27%
Electrification of the vehicle fleet	25%	27%	33%	35%	33%	40%	20%	24%
Average number of quotes	3,6	3,4	3,9	3,6	3,6	3,8	3,5	3,4

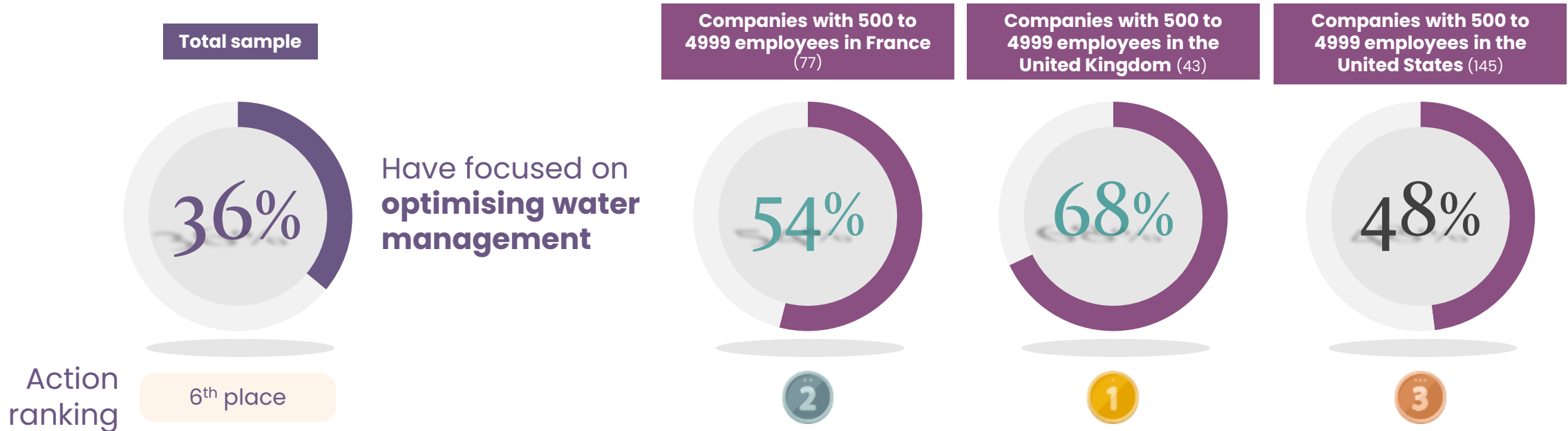
Companies that are already fully operational or in deployment



In France, the United Kingdom and, to a lesser extent, the United States, the largest medium-sized companies are prioritising the optimisation of water management, a key pillar in their decarbonisation process.

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

Basis: Decision-makers that have already implemented decarbonisation measures (898)

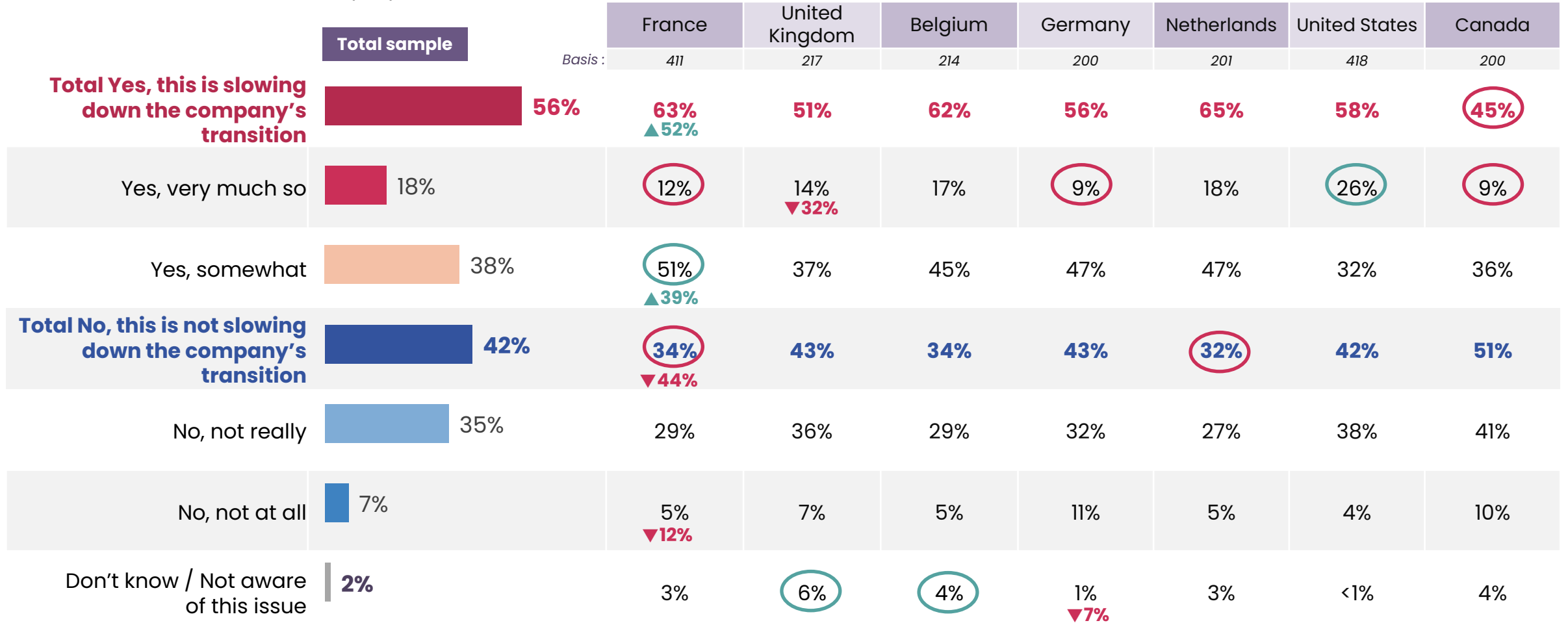




Political discourse and that of some business leaders on decarbonization still concretely hinder the transition of industrial companies: over half of European companies say that they are affected by this, almost two thirds in France, less resilient to this than last year even though the United Kingdom is now less concerned. The impact of the media is felt less in Canada.

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

Basis: all decision-makers (1861)

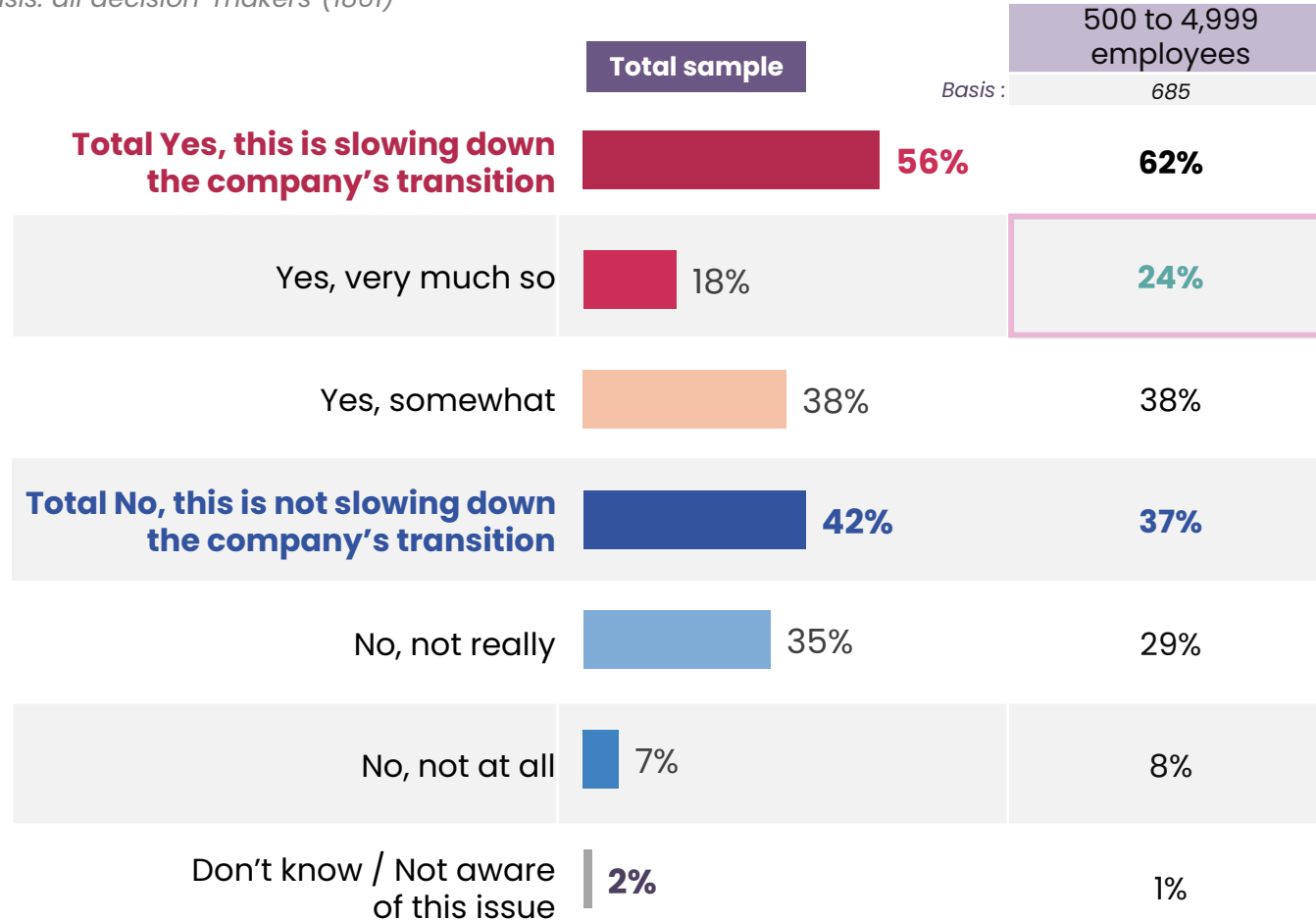




Large medium-sized companies seem to be more affected than the average.

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

Basis: all decision-makers (1861)



04



The concept of adaptation



Definition of adaptation

Adaptation to climate change is the process of adjusting to current or expected future climate, whether this means variations in climate or extreme climatic events. This translates into the implementation of measures that aim to reduce the negative effects of climate change. It complements the decarbonisation actions that aim to reduce the causes of climate change.



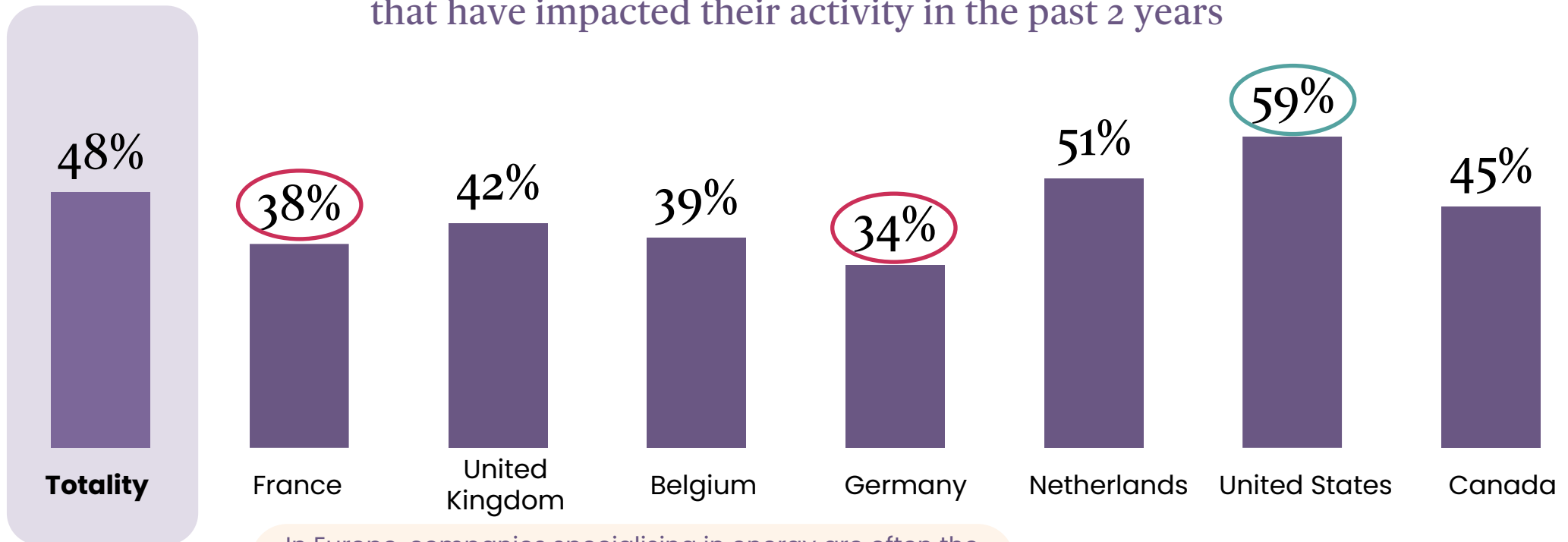
With 1 in 2 industrial companies saying that their activity has been impacted by climatic conditions over the last 2 years, the concept of adapting to climate change is a reality. While the United States are the most affected by this, the Netherlands is particularly affected out of all European countries.

New question in 2026

Q1v2 : Over the past 2 years, has your company been affected by climatic conditions impacting your operations (supply chain disruption, material damage...)?

Basis: all decision-makers (1861)

Have been a victim of climatic conditions that have impacted their activity in the past 2 years



In Europe, companies specialising in energy are often the most affected.



Despite the significant differences in intensity between countries, adaptation to climate change seems to be an obvious necessity: well perceived, topical and a driving force behind a variety of benefits such as innovation, a guarantee of business continuity, maintenance of asset value and insurability, and risk management, particularly legal risks.

New question in 2026

Q2v2 : Do you agree with each of the following statements regarding the industry in general?

Basis: all decision-makers (1861)

In the industry, climate change adaptation...

	Completely Agree	Total Agree	France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
			Basis : 411		217		214		200		201		418		200	
			Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree
pushes companies in the sector to innovate more	46%	92%	33%	86%	55%	96%	35%	87%	33%	90%	45%	89%	54%	92%	37%	92%
is possible because the applicable solutions are known	40%	89%	28%	84%	47%	94%	32%	87%	26%	87%	36%	86%	53%	92%	25%	87%
ensures the continuity of operations and infrastructure	40%	89%	36%	90%	46%	92%	30%	83%	20%	81%	35%	87%	52%	93%	31%	88%
is essential for maintaining the value and insurability of assets	41%	87%	31%	89%	50%	91%	32%	86%	20%	81%	37%	85%	53%	90%	36%	88%
improves risk management in the industry	41%	86%	28%	87%	48%	91%	29%	85%	29%	82%	33%	85%	51%	88%	32%	87%
is a priority to cover legal risks toward employees, clients, and third parties	38%	85%	27%	89%	50%	93%	38%	83%	24%	80%	39%	82%	45%	85%	38%	83%
is a process that is already widely underway	33%	82%	23%	82%	42%	88%	27%	81%	19%	73%	27%	82%	42%	89%	33%	69%



In comparison to decarbonisation, adaptation seems to be viewed as slightly less effective in terms of its ability to boost innovation in France, Belgium and the United States. The USA tend to downplay the sector's involvement here, even if they do feel more advanced than others. Canada remains somewhat stuck due to a lack of awareness of the solution.

RECALL

Q2v2 : Do you agree with each of the following statements regarding the industry in general?

Basis: all decision-makers (1861)

In the industry, climate change adaptation...

	Completely Agree	Total Agree	France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
			Basis:		Basis:		Basis:		Basis:		Basis:		Basis:		Basis:	
			411	217	214	200	201	418	200							
			Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree
pushes companies in the sector to innovate more	46%	92%	33%	86%	55%	96%	35%	87%	33%	90%	45%	89%	54%	92%	37%	92%
is possible because the applicable solutions are known	40%	89%	28%	84%	47%	94%	32%	87%	26%	87%	36%	86%	53%	92%	25%	87%
is a process that is already widely underway	33%	82%	23%	82%	42%	88%	27%	81%	19%	73%	27%	82%	42%	89%	33%	69%

RECALL

Q2v2 : Do you agree with each of the following statements regarding the industry in general?

Basis: all decision-makers (1861) **Decarbonise industry...**

	Completely Agree	Total Agree	France		United Kingdom		Belgium		Germany		Netherlands		United States		Canada	
			Basis:		Basis:		Basis:		Basis:		Basis:		Basis:		Basis:	
			411	217	214	200	201	418	200							
			Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree	Completely Agree	Total Agree
pushes companies in the sector to innovate more	52%	93%	45%	92%	55%	96%	45%	88%	39%	92%	47%	90%	63%	94%	41%	93%
is possible because the applicable solutions are known	44%	91%	31%	90%	48%	94%	32%	86%	31%	91%	41%	86%	56%	93%	27%	84%
is a process that is already widely underway	39%	85%	27%	79%	45%	90%	32%	83%	19%	74%	32%	85%	53%	93%	30%	76%



The largest mid-sized companies are particularly expansive.

New question in 2026

Q2v2 : Do you agree with each of the following statements regarding the industry in general?

Basis: all decision-makers (1861)

In the industry, climate change adaptation...

	Completely agree	Total Agree	500 to 4,999 employees	
			Completely Agree	Total Agree
pushes companies in the sector to innovate more	46%	92%	50%	95%
is possible because the applicable solutions are known	40%	89%	43%	92%
ensures the continuity of operations and infrastructure	40%	89%	55%	93%
is essential for maintaining the value and insurability of assets	41%	87%	57%	93%
improves risk management in the industry	41%	86%	53%	90%
is a priority to cover legal risks toward employees, clients, and third parties	38%	85%	49%	93%
is a process that is already widely underway	33%	82%	38%	85%

Larger medium-sized companies identify the issues in most countries better: the Netherlands and Belgium are the exception to the rule here.



While everyone is talking about the issue of adaptation, most industrial players are currently in the thinking rather than doing phase. Only in the United Kingdom and the United States are half of companies currently deploying measures. While the Netherlands are behind here, they are ahead when it comes to defining a strategic plan.

New question in 2026

Q3v2 : And concretely, at what stage is your company regarding climate change adaptation?

Basis: all decision-makers (1861)

	Total sample	France	United Kingdom	Belgium	Germany	Netherlands	United States	Canada
		Basis :						
		411	217	214	200	201	418	200
Fully operational or in deployment	41%	31%	52%	31%	31%	30%	49%	32%
It has completed its adaptation to climate change	7%	4%	10%	6%	3%	11%	10%	3%
It has started to implement adaptation measures	34%	27%	42%	25%	28%	19%	39%	29%
It has set itself specific targets	27%	27%	18%	34%	29%	38%	24%	34%
It has started to give it some initial consideration	26%	37%	28%	28%	34%	24%	21%	26%
It still hasn't considered the issue	6%	5%	2%	7%	6%	8%	6%	8%

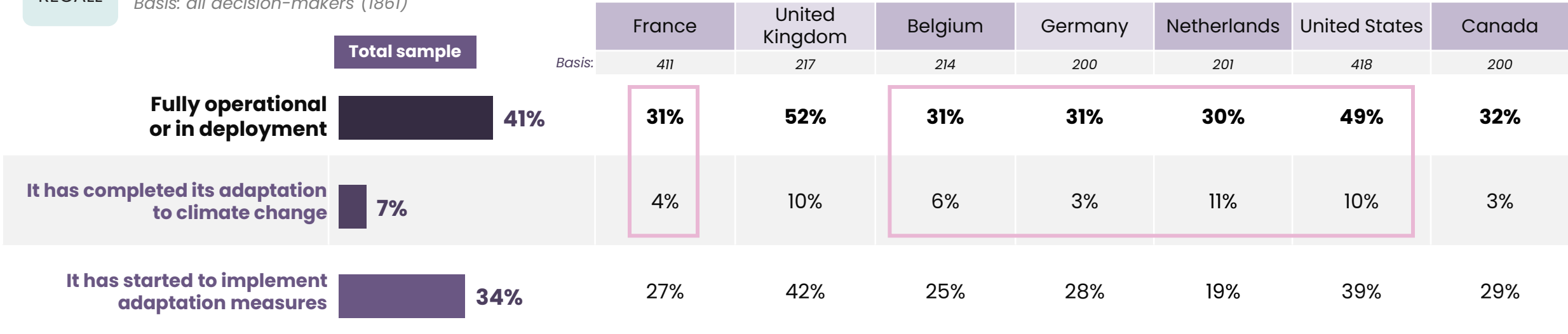


In comparison to decarbonisation, progress with adaptation is slightly behind in most countries, with the exception of the United Kingdom and Canada who are deploying both approaches at a relatively similar speed.

RECALL

Q3v2 : And concretely, at what stage is your company regarding climate change adaptation?

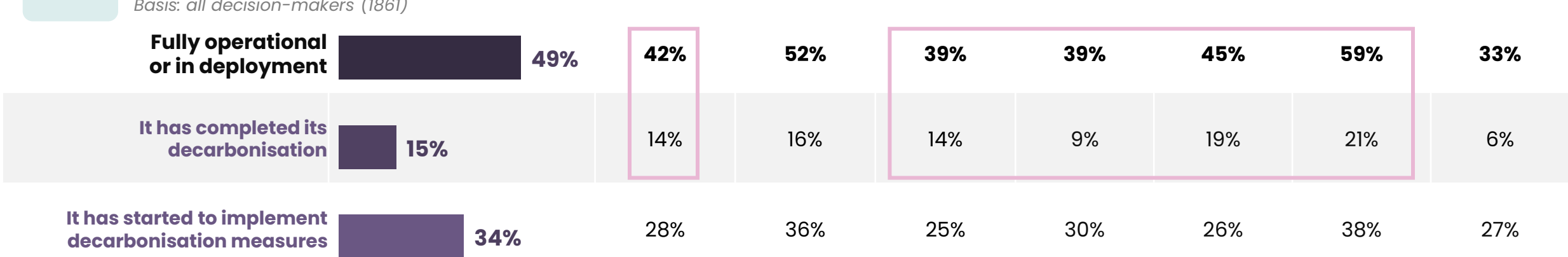
Basis: all decision-makers (1861)



RECALL

Q8 : And concretely, at what stage is your company regarding decarbonisation?

Basis: all decision-makers (1861)



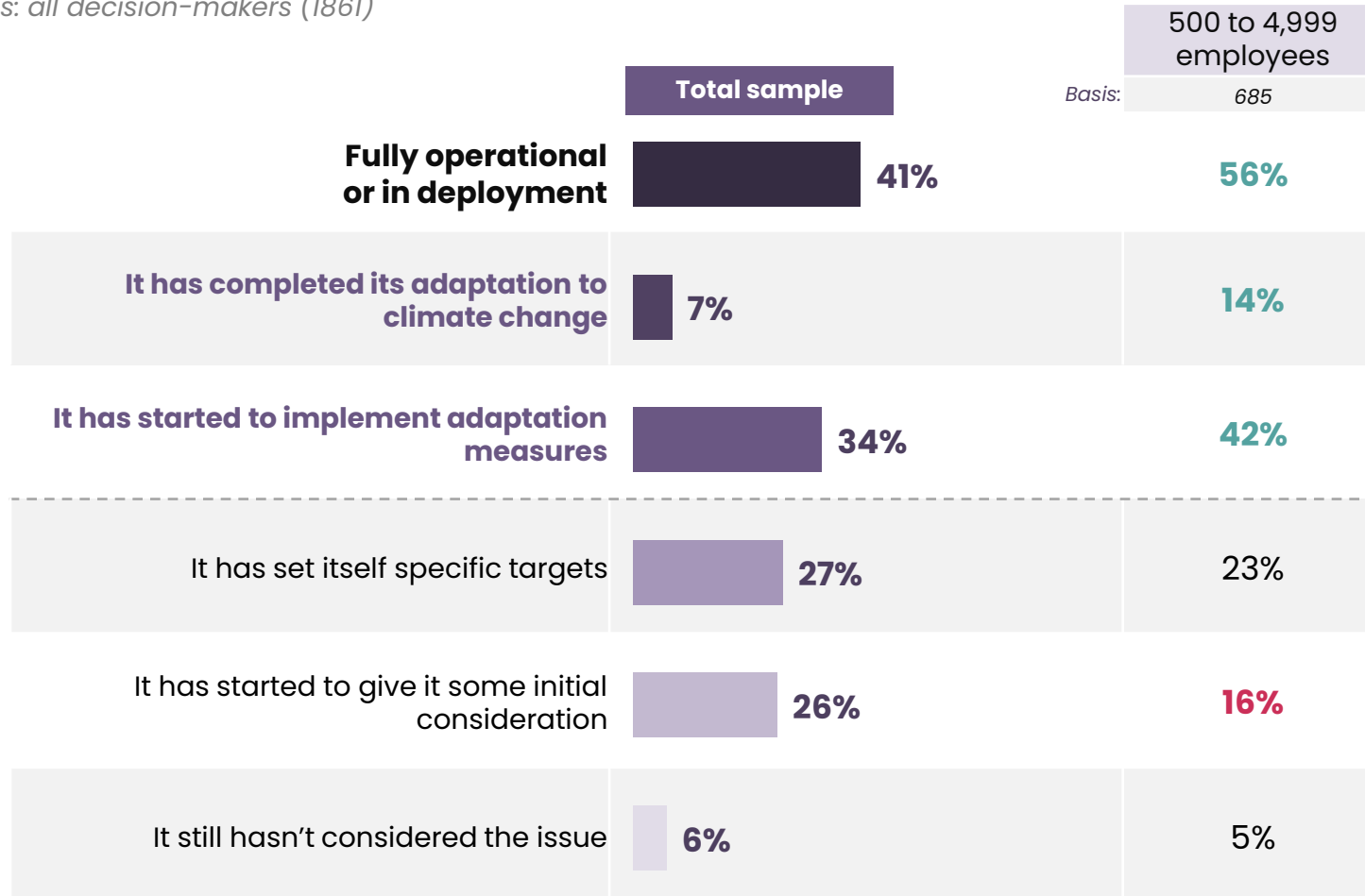


More convinced by the positive impact of adaptation, medium-sized companies that have more employees are taking on this subject.

New question in 2026

Q3v2 : And concretely, at what stage is your company regarding climate change adaptation?

Basis: all decision-makers (1861)



Significant advancements in the biggest structures can be seen in the United States, but also in France and the Netherlands.



More specifically, companies are multiplying areas of action without making any of them essential. Resorting to alternative back-up solutions for energy and telecommunications infrastructures tend to be more frequent in the Netherlands, but also truly is in the larger structures in the United States and the United Kingdom.

New question in 2026

Q4v2 : Which category(ies) of actions has your company deployed as part of its climate change adaptation approach?

Basis: has implemented adaptation measures (772)

		France	United States	Belgium	Germany	Netherlands	United States	Canada
	Totality	140	108	71	65	70	245	73
Using alternative backup solutions for energy and telecom infrastructures	56% 500 to 4,999 employees : 66%	48%	61% 500 to 4,999 employees : 80%	66%	59%	71%	53% 500 to 4,999 employees : 67%	66%
Equipping with protection solutions	55%	55%	58%	54%	56%	64%	56%	42%
Implementing detection and simulation solutions	50%	45%	50%	51%	37%	63%	51%	62%
Planning organizational crisis management measures	48%	48%	46%	51%	36%	39%	53%	43%
Conducting a vulnerability diagnosis of the facilities	30%	40%	34%	37%	26%	37%	29%	29%
Average number	2,4	2,4	2,5	2,6	2,1	2,7	2,4	2,4



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Crédits : steven-wright

Summary

Dashboard - All countries

“Decarbonisation is a necessity when it comes to responding to the climate emergency”



Agree with this statement

“Decarbonising the industrial sector is harder than decarbonising other sectors.”



Agree with this statement

Completely agree

“Decarbonising the industrial sector is a long-term project.”

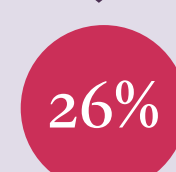


Agree with this statement

A decarbonisation process that is complicated to begin with because...



The proposed solutions are complex



The required investments exceed the company's means



It is difficult to find suitable collection-recycling-reuse channels

In their progress with regards to decarbonisation...



are already fully operational or in deployment

To replace all or some of the fossil fuels used...



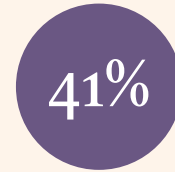
of companies that have deployed these types of actions have focused on solar power and storage (battery)

“In the industrial sector, adapting to climate change means that companies can ensure that they can continue to exploit activities and infrastructures”



Agree with this statement

In their progress with regards to adaptation to climate change...



Are fully operational or in deployment

A process of adaptation to climate change that relies on...



Resorting to alternative back-up solutions for energy and telecommunications infrastructures

Equipment for protection solutions



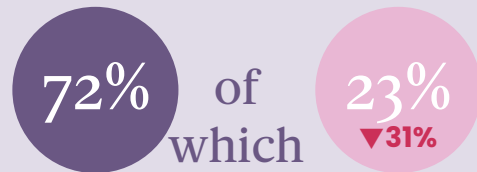
Dashboard - Europe

“Decarbonisation is a necessity when it comes to responding to the climate emergency”»



Agree with this statement

“Decarbonising the industrial sector is harder than decarbonising other sectors.”



Agree with this statement

Completely agree

“Decarbonising the industrial sector is a long-term project.”



Agree with this statement

A decarbonisation process that is complicated to begin with because...



The proposed solutions are complex



The required investments exceed the company's means

In their progress with regards to decarbonisation...



are already fully operational or in deployment

To replace all or some of the fossil fuels used...



of companies that have deployed these types of actions have focused on solar power and storage (battery)

“In the industrial sector, adapting to climate change means that companies can ensure that they can continue to exploit activities and infrastructures”



Agree with this statement

In their progress with regards to adaptation to climate change...



Are fully operational or in deployment

A process of adaptation to climate change that relies on...



Resorting to alternative back-up solutions for energy and telecommunications infrastructures

Equipment for protection solutions

57%

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