



European
Commission



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FLASH EUROBAROMETER 549

SMEs, resource efficiency and green markets

EUROBAROMETER SUMMARY
JUNE 2024



Survey conducted by Ipsos European Public Affairs at the request of the European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs

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Introduction

The EU's 25.8 million small and medium enterprises (SMEs) are the backbone of the EU economy. Employing 88.7 million people, they contributed significantly to the EU employment and value added.¹ As well as being economically important, SMEs are environmentally important: although their individual impact is small, their cumulative impact on the environment is significant.

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**² 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).³

Flash Eurobarometer 549 'SMEs, resource efficiency and green markets' was conducted by Ipsos European Public Affairs in the 27 Member States of the European Union (EU), Iceland, Norway, Switzerland, the United Kingdom, Albania, Moldova, Montenegro, North Macedonia, 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 findings presented in this summary report focus on **SMEs in the EU (13 124 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.
- Percentages may not add up to 100%, as they are **rounded to the nearest percent**. Response percentages exceed 100% if the question allowed respondents to select multiple responses.
- For some of the small Member States (Cyprus, Malta and Luxembourg), the **sample size is relatively low**, and results should be interpreted with caution as they carry a larger margin of error.

¹ 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>

² 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://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020DC0103>)

³ For more information:

<https://europa.eu/eurobarometer/surveys/browse/all/series/17833>

1. Going green and resource efficient

1.1. Resource efficiency actions taken by SMEs

Most SMEs surveyed are taking measures to be more resource efficient: **93% of SMEs are taking at least one of the actions listed in the survey**, while 6% are not taking any action.

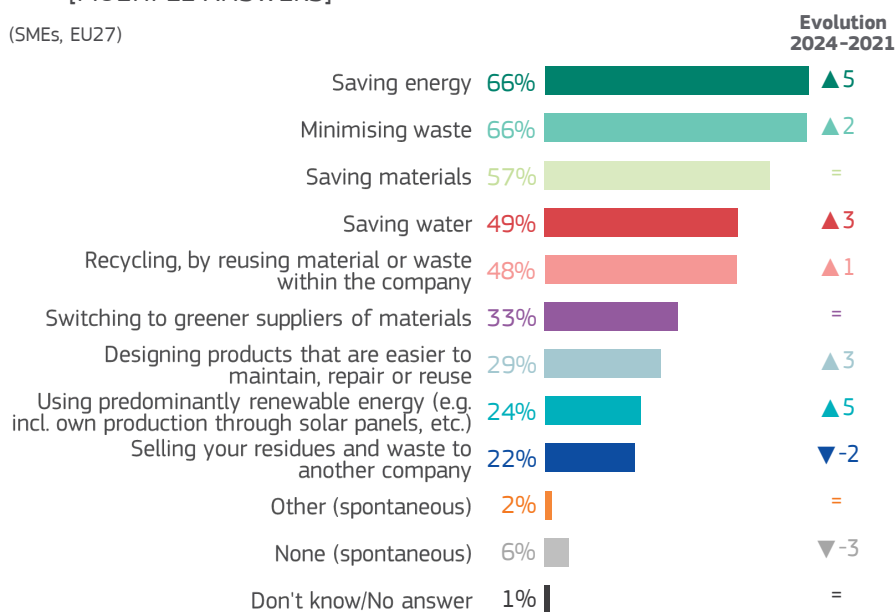
- **Compared to 2021**, there is a small, but significant, increase in the proportion of SMEs taking action to be more resource efficient (from 89% to 93%).
- Nonetheless, **in nine Member States, there are at least 10% of SMEs that are not (yet) taking action**; with the overall highest proportion observed in Latvia (25%), followed by Slovenia (18%), Hungary (17%), Estonia (17%) and Romania (16%).

Most SMEs are undertaking a range of resource efficiency measures. More specifically, 42% of SMEs report that they are undertaking five or more of the resource efficiency actions listed in the survey and 31% are undertaking three or four actions.

- The **most common resource efficiency actions undertaken by 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 through solar panels, etc.) (24%, +5 pp).

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

(SMEs, EU27)



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

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

Using renewable energy

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

- SMEs in Belgium (34%) are overall the most likely to report that they **generate renewable energy onsite**; 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%).

Resource efficiency actions planned for the next two years

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 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.

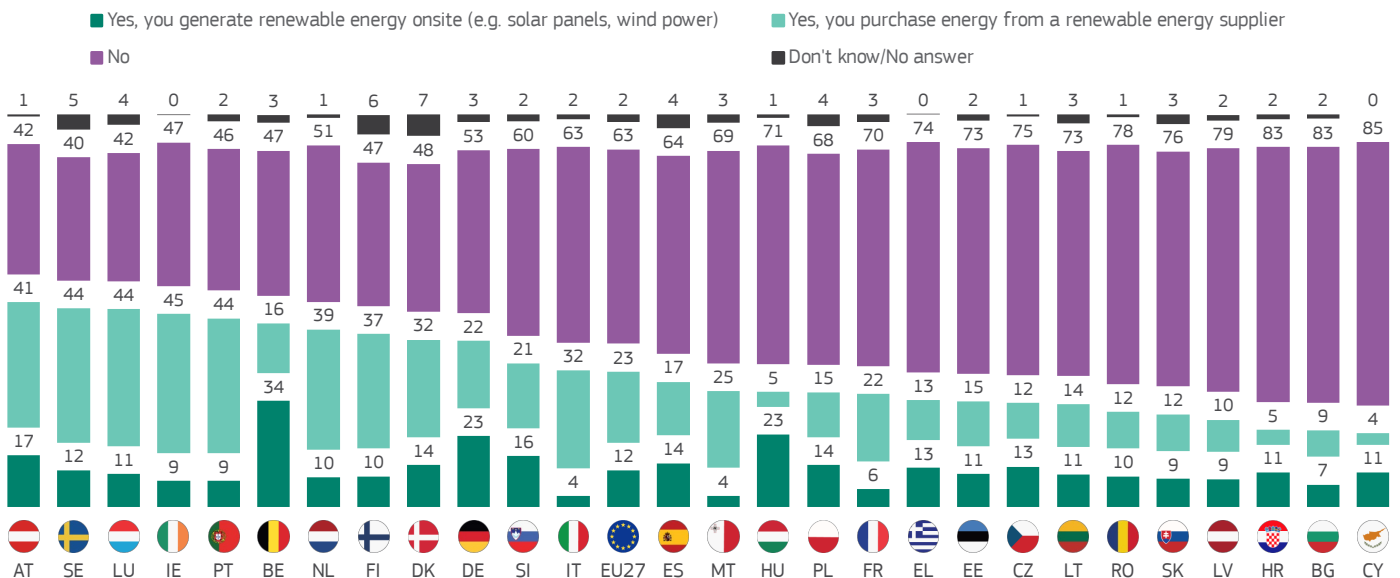
Strategy to become climate neutral or negative

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**.

- 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 Belgium, Finland and Spain, there is a **clear increase compared 2021** in the share of SMEs with a concrete strategy in place to reduce their carbon footprint (+7pp in Spain, +8 pp in Belgium and +10 pp in Finland).

N1a Does your company use renewable energy sources?

(SMEs, EU27)



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

1.2. Investment in resource efficiency

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 and **25% say that the investment amounted to between 1% and 5% of their annual turnover, on average.** In total, 38% of SMEs have invested at least 1% of their annual turnover on average, over the past two years.

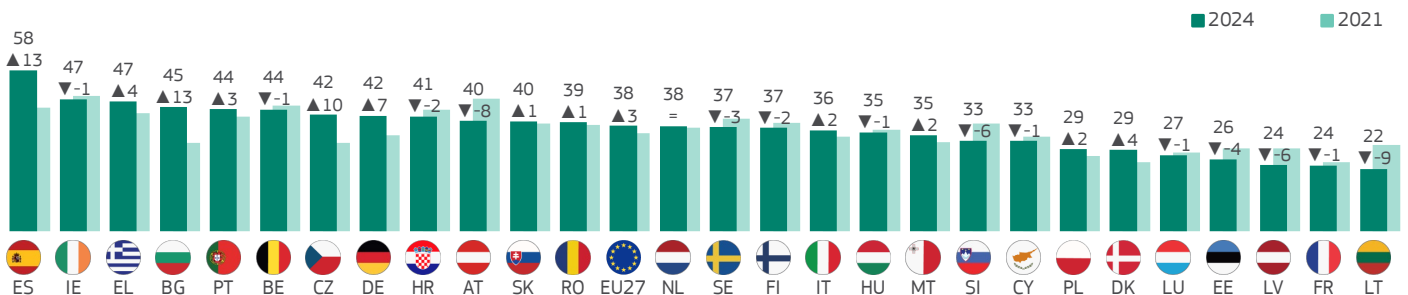
- The **total proportion of SMEs that have invested at least 1% of their annual turnover** on average, over the past two years, varies **between 22% in Lithuania and 58% in Spain.** In Greece and Ireland, 47% of SMEs have invested at least 1% of their annual turnover.

- 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 Member States where SMEs are **now less likely to have invested** at least 1% of their annual turnover on resource efficiency measures: 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)

1.3. 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.

- Between **13% of SMEs undertaking resource efficiency actions in Malta and 47% in Spain** report that **the cost of environment actions** is a barrier when taking resource efficiency measures.
- 26% of SMEs undertaking resource efficiency actions reply that they **did not encounter any difficulties** when setting up these actions; this proportion varies between 10% in Ireland and 51% in Estonia.

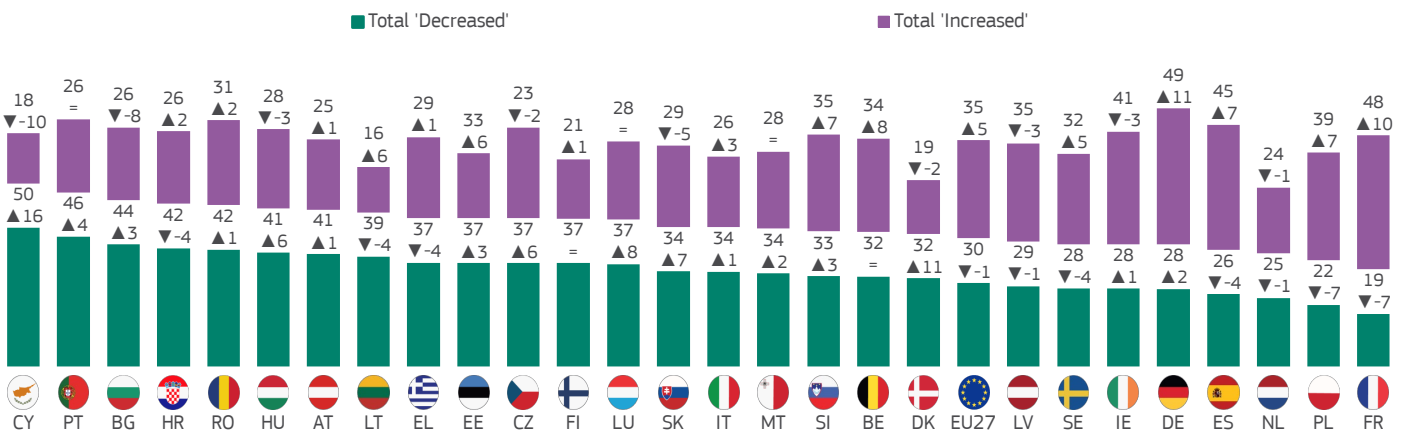
Impact of resource efficiency actions on production costs

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.

- There is a **large variation across Member States** in the proportion of SMEs that have seen their production costs either **increase or decrease** due to the resource efficiency actions undertaken. In Cyprus, 50% of SMEs say that the resource efficiency actions they have undertaken have led to a decrease in production costs. In Germany and France, on the other hand, nearly half of SMEs (48%-49%) have seen an increase 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...

(SMEs, EU27)



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

1.4. Support to go green and resource efficient

Among SMEs that take 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.**

- The share of SMEs that have taken resource efficiency actions and rely on **external support** in their efforts to be more resource efficient is the highest in Hungary and Malta (both 33%), followed by Austria and France (both 30%). The lowest proportions relying on external support are observed in Estonia (5%), and in Latvia and Poland (both 6%).

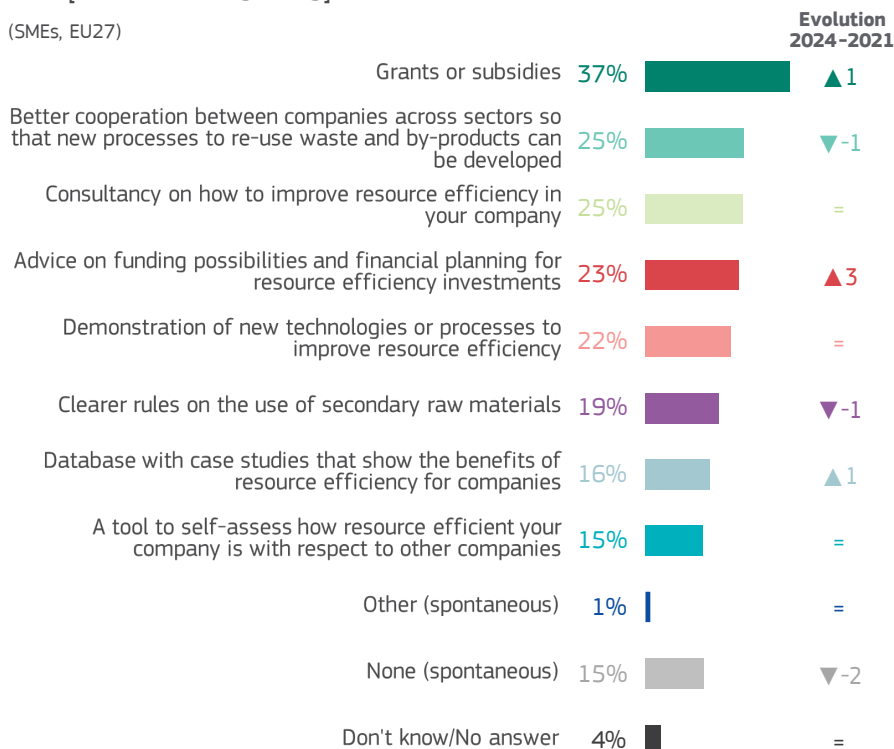
What would help SMEs most to go green and resource efficient?

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.

- 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 have a preference for this type of support: Slovakia (50%), Slovenia (53%), Greece (56%), Malta (57%) and Cyprus (59%).
- 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 favoured the least.
- 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 greener and resource efficient (+3 pp).

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)

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

2. Green markets

2.1. SMEs offering green products or services

Green products and services have a predominant function of **reducing environmental risk and minimising pollution and resources**; this category also includes products with environmental features (e.g. organically produced, eco-labelled, with significant recycled content or eco-designed etc.).

32% of SMEs report to **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.

- The proportion of SMEs currently offering green products or services and the proportion planning to do so in the next two years remained the **same as in 2021**.
- **At least about one in five SMEs across most Member States currently offer green products or services**. SMEs in the Netherlands (46%), Austria (42%), Luxembourg (40%) and Denmark (40%) are the most likely to be doing so, while those in Hungary (16%), Cyprus (17%) and Romania (18%) are the least likely.

- **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%.

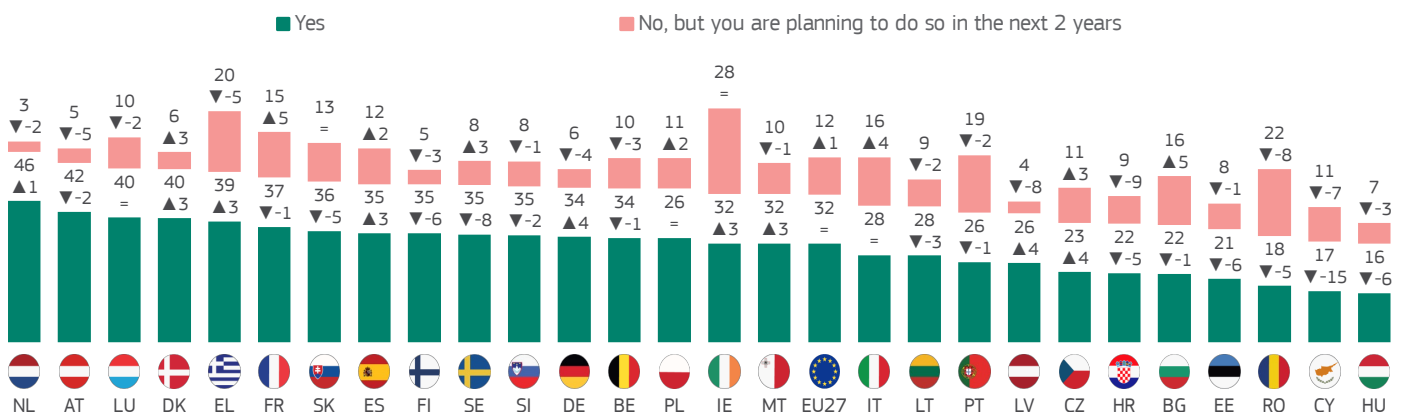
- The proportion of SMEs using recycled materials in their products/production ranges from 18% in Hungary to 66% in the Netherlands.

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.

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)

2.2. 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**.

- Austria stands out with 44% of SMEs **relying on external support** for the production of their green products and services. Austria is followed by Spain (40%) and Belgium (38%). The lowest proportion of SMEs relying on external support is seen in Poland (7%).

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%), 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).

- In most 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 (from 27% in Luxembourg to 71% in Greece).

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**.

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)

3. 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 (38%) have at least one full-time employee working in a green job some or all the time.

- 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. In Italy (47%), Spain (48%) and Romania (49%), nearly half of SMEs have at least one green employee. Other countries at

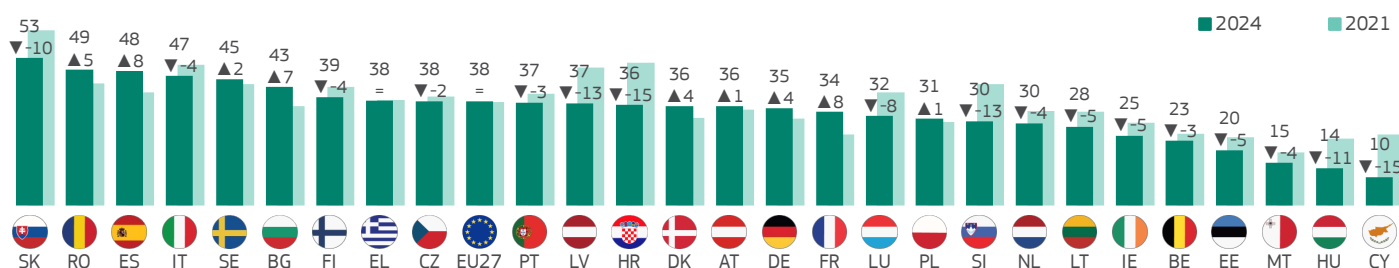
the lower end of the country ranking are Hungary (14%) and Malta (15%).

- 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%).

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)

