2023

THE CIRCULAR VOICE

5,000 CONSUMERS ON CIRCULAR PRODUCTS AND MATERIALS

CONTENTS

BACKGROUND

PURPOSE

Stena Recycling runs several initiatives surrounding sustainability and recycling – from the design process to recycling and back again. What many see as the end of a product's useful life, is to Stena the beginning of something new. However, accelerating the work towards a circular future requires joint efforts; consumers and companies must also change their behaviors and habits.

To increase the understanding of attitudes to sustainability, circular materials and recycling, Origo Group – on behalf of Stena Recycling – has conducted a consumer survey in Sweden, Denmark, Norway, Finland and Poland. The purpose is to provide the industry with insights into the information initiatives required to influence attitudes towards circular materials, and enable comparisons between different groups and markets.

THE CIRCULAR ECONOMY

Today, around 100 billion tons of virgin materials are extracted each year. To achieve a circular economy, we need to use the resources that are already in circulation much more efficiently by – for example – extending the life of products, minimizing resource waste and increasing recycling rates. Increased use of recycled materials and recyclable products reduces our dependence on natural resources and is therefore beneficial for the climate as well as the general society.

As the population grows, it becomes increasingly important to limit the use of untouched natural resources. Many manufacturing companies have set ambitious climate goals, based on efficient use of resources. The use of virgin raw materials accounts for a significant part of a product's total climate impact during its life cycle. This means that increasing the use of recycled materials is a prerequisite for reducing the carbon footprint.

FOR A CLIMATE NEUTRAL FUTURE

If we continue to use resources the same way we do today, we will need resources from three planets by 2050. But the ambitions to reverse this trend are high. The EU's new climate targets entail a reduction in current greenhouse gas emissions of at least 55 percent by 2030, and achieving climate neutrality by 2050. Today, manufacturing companies' use of materials accounts for a large share of the total climate impact. More efficient use of materials –starting as early as the design process – is an important part of the transition to a circular economy.

CIRCULARITY FROM A CONSUMER PERSPECTIVE

There are a lot of reports about companies' work around climate goals, but not as much about what consumers actually expect and how they view the products they consume. For that reason, Stena Recycling conducted a survey in collaboration with the research company Origo Group in May 2023, as part of the Circular Initiative collaboration arena.

Online surveys were conducted in Sweden, Denmark, Finland, Norway and Poland. In the survey, 1,000 consumers in each market (a total of 5,000) were asked questions about recycled materials, product characteristics and availability, consumption patterns, barriers, and expectations. The survey focused specifically on recyclable products made from recycled material.

This survey is the second one of its kind. The first was completed in January 2022.

ABOUT STENA RECYCLING

Stena Recycling operates 160 recycling facilities in seven countries: Sweden, Norway, Denmark, Finland, Poland, Germany, and Italy. Every year, six million tons of waste is recycled from around 100,000 customers in different industries. The recycled materials are then sold as circular high-quality raw materials on a global market.

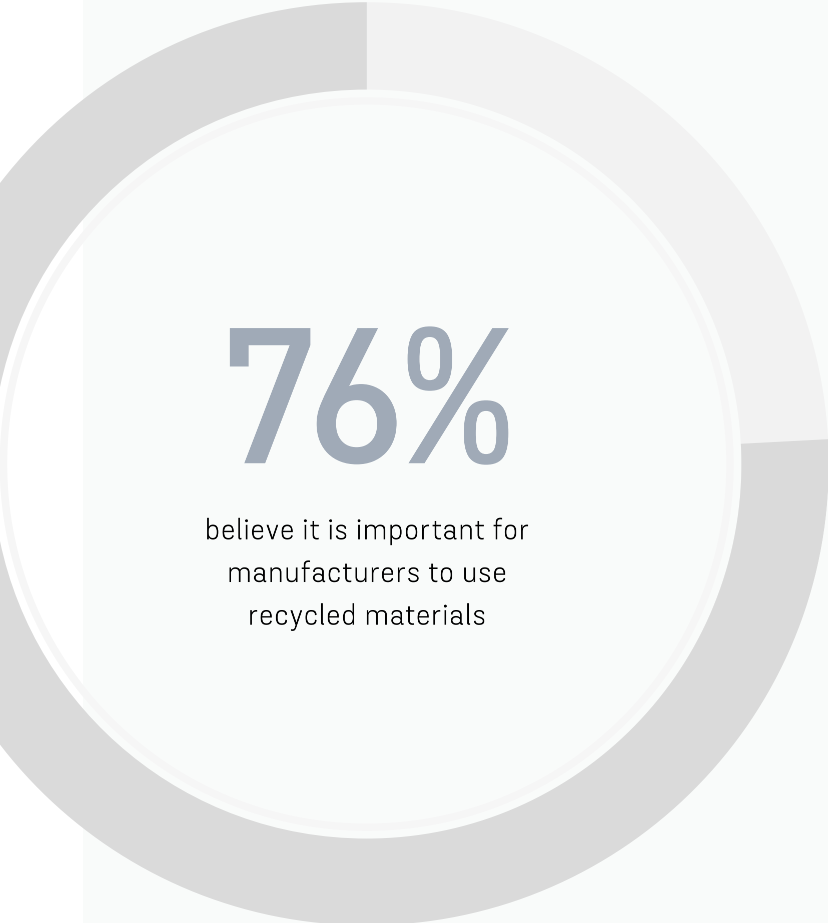
Stena Recycling collaborates with customers in circular partnerships across the entire materials value chain. The company's experts help companies with sustainable solutions that support a circular economy. This includes product design, training, and the development of optimized process and material flows supporting companies' transition to climate neutrality and a circular business model.

www.stenarecycling.com

ABOUT CIRCULAR INITIATIVE

This year marks the fifth year of Circular Initiative, which brings together leaders from industry and business. This year's theme is Scaling Up, meaning realizing bold ideas and put promising prototypes into production. To put it simply: It is time to take the leap into the loop and turn circularity into profitable business.

Companies taking to the stage this year include Investor AB, Electrolux, ABB and Alfa Laval, who will share their lessons learned and challenges faced these past few years. New partners such as Outokumpu and Vestas will also share their challenges and collaborations.



56 percent believe that the food industry is good at providing information about the recycling rate of their products

50 percent believe that the fashion industry is good at providing information about the recycling rate of their products

WHO HAS THE GREATEST RESPONSIBILITY FOR DRIVING THE TRANSITION TOWARDS INCREASED USE OF RECYCLED MATERIALS?

BUSINESSES
Poland

POLITICIANS/ AUTHORITIES
Norway

POLITICIANS/ AUTHORITIES
Sweden

CONSUMERS
Denmark

BUSINESSES
Finland

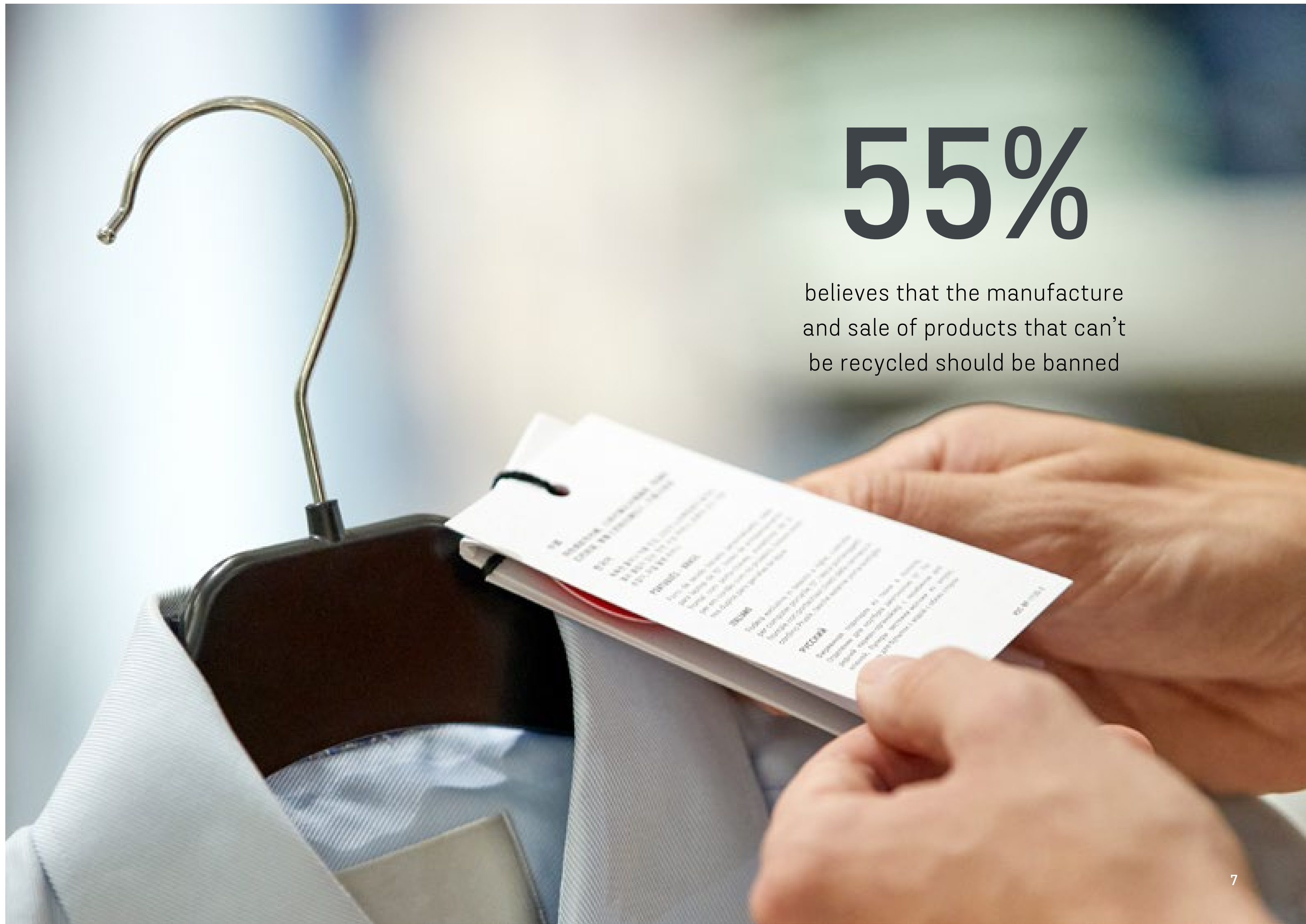
TRANSPARENCY HIGH ON THE WISH LIST

The first step towards a circular product flow happens in the design process. Today, product design is not just about appearance and function. It is also about making sure that the product lasts as long as possible, is easy to repair to extend its service life, and can be recycled to the greatest extent possible when it can no longer be used.

A majority – 55 percent – believe that the manufacture and sale of products that can't be recycled should be banned.

Many people demand transparency. Three out of four think it is important or very important that there is clear information about whether a product is made from recycled material or not.

Some industries have made more progress on informing consumers about the recyclability of products than others. At the forefront is the food industry, with 56 percent of consumers expressing a positive perception of the industry's performance. The corresponding figures for the fashion and electronics industries are 50 and 48 percent respectively.



ATTITUDES TO CIRCULAR PRODUCTS AND MATERIALS

VALUE-DRIVEN SHOPPING HABITS

A large majority is striving towards a more circular way of life in the future. As many as seven out of ten consumers are looking for a wide range of sustainable products and a majority – 57 percent – are willing to adjust their consumption to reduce their climate impact.

Many people's shopping habits are already influenced by personal values. As many as 38 percent say they have avoided buying a product that does not align with their views. The country with the largest share of respondents (44 percent) who have rejected products due to personal values is Sweden. Neighboring Denmark is the country where the smallest share of respondents (34 percent) have made such decisions. Making value-based decisions is also more common in the younger age groups. Nearly half (48 percent) in the age group 18-29 years reject products based on values, compared to one in four (28 percent) in the age group 50-65 years.

A majority (57 percent) of all respondents are prepared to change their consumption habits completely or partially to reduce their climate impact. This means that just over 39 million people in the five countries surveyed would consider changing their consumption habits in the future. Of these, over 11 million would consider changing their consumption habits completely to reduce their climate impact.

Nearly half of the respondents in the younger age groups have their values in mind when making their purchases. The survey confirms that circular investments are strategically important for companies and will become increasingly important. We see more companies starting to understand the future significance of a circular business model.

Systems that involve circulating and retaining resources increase profitability as well as competitiveness. This benefits not only the business, but also the environment.

Anna Sundell, Head of Sustainability & Communications at Stena Metall

DEMAND IS A STRONG INCENTIVE FOR LABELING

Many people are asking for labeling of products made from recycled material. Three out of four attach great importance to this information being clearly presented. Just eight percent indicate that they care very little or not at all about information regarding whether a product is made from recycled material or not.

Nearly four out of five (79 percent) consider clear product information to be the most important factor when assessing whether a product is sustainable or not. It is, therefore, at the top of the list, closely followed by whether the product is easy to repair or has low energy consumption during use (77 percent). Clear product information is most in demand in Poland, where it is requested by 84 percent of respondents. This is closely followed by Finland at 77 percent.

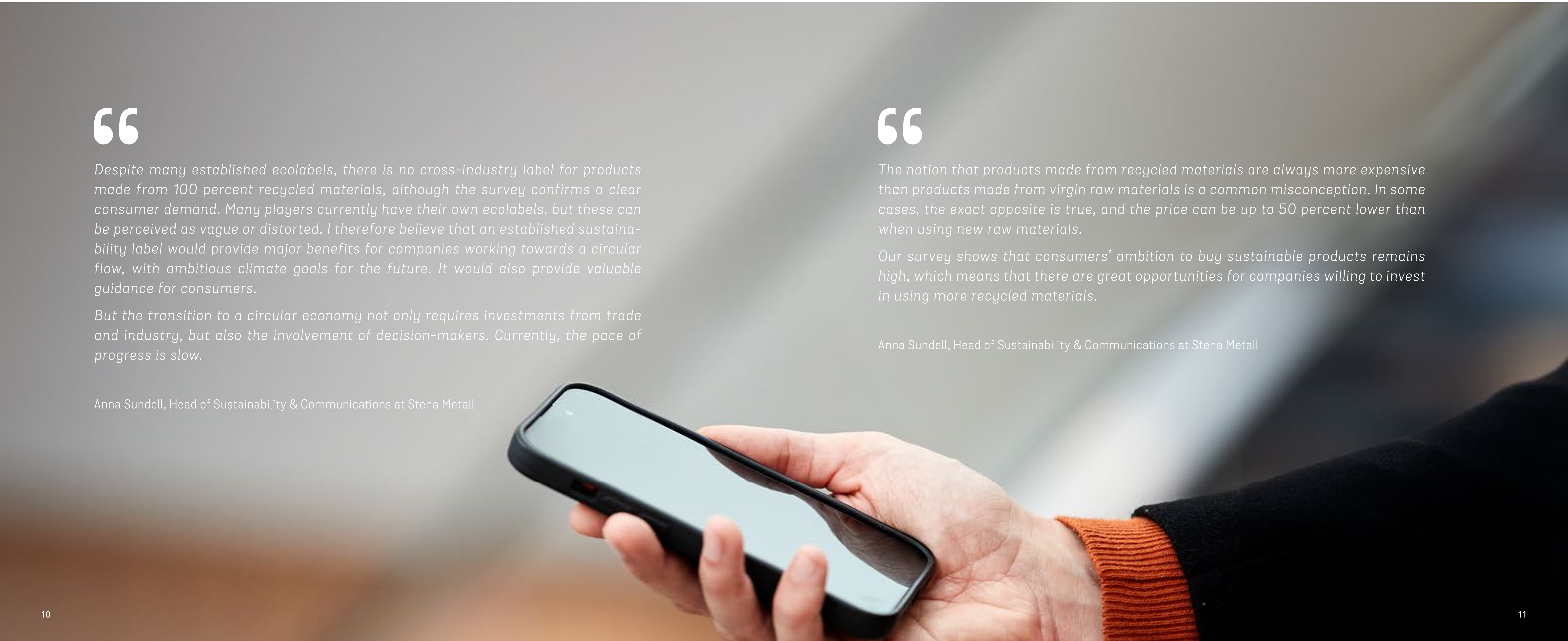
The lack of labeling has consequences for consumers' purchasing behavior. When consumers were asked about the main reason why they do not buy products made from recycled material, the largest share – 26 percent – stated that it is due to difficulties to understand which products are made from recycled material. This affects consumers more than price (23 percent) or insufficient product range (22 percent). Ten percent say that it takes too long to find the right product. This could also be remedied through labeling.

HIGH AMBITIONS – BUT BOTTLENECK ECONOMY

Many consumers highly value recycled and recyclable products. But to what extent do they prioritize circularity in financially challenging times? It turns out that cost is a clear barrier. One in four believe that it is too expensive to choose products made from recycled materials, and 55 percent of respondents believe that recyclable products are more expensive than other products. The figures are highest in Sweden (57 percent) and Poland (56 percent).

Fewer people are willing to pay more for recycled products this year than last year. This year, the figure is 20 percent – compared to last year's 23 percent. In Denmark, it is mainly men aged 18-29 who are willing to pay more for recyclable products made from recycled materials (28 percent). Finland has the lowest percentage of respondents willing to pay more – 13 percent.

Although ambitions remain high, a quarter of the consumers purchased fewer recyclable products due to price increases in 2022-2023. The figure was highest in Sweden and Finland (29 percent) and lowest in Denmark (21 percent). There is a clear correlation between this figure and income. Out of respondents with a monthly salary of EUR 1,299 or less, 27 percent have purchased fewer recyclable products, compared to 17 percent of those with a monthly salary of at least EUR 3,900.



"

Despite many established ecolabels, there is no cross-industry label for products made from 100 percent recycled materials, although the survey confirms a clear consumer demand. Many players currently have their own ecolabels, but these can be perceived as vague or distorted. I therefore believe that an established sustainability label would provide major benefits for companies working towards a circular flow, with ambitious climate goals for the future. It would also provide valuable guidance for consumers.

But the transition to a circular economy not only requires investments from trade and industry, but also the involvement of decision-makers. Currently, the pace of progress is slow.

Anna Sundell, Head of Sustainability & Communications at Stena Metall

"

The notion that products made from recycled materials are always more expensive than products made from virgin raw materials is a common misconception. In some cases, the exact opposite is true, and the price can be up to 50 percent lower than when using new raw materials.

Our survey shows that consumers' ambition to buy sustainable products remains high, which means that there are great opportunities for companies willing to invest in using more recycled materials.

Anna Sundell, Head of Sustainability & Communications at Stena Metall

LOWER CARBON FOOTPRINT

Eight out of ten respondents highly value durable products – for example products that are easily repaired or where parts can be reused. A product's service life is given the highest priority in Poland (85 percent) and the lowest in Sweden (69 percent).

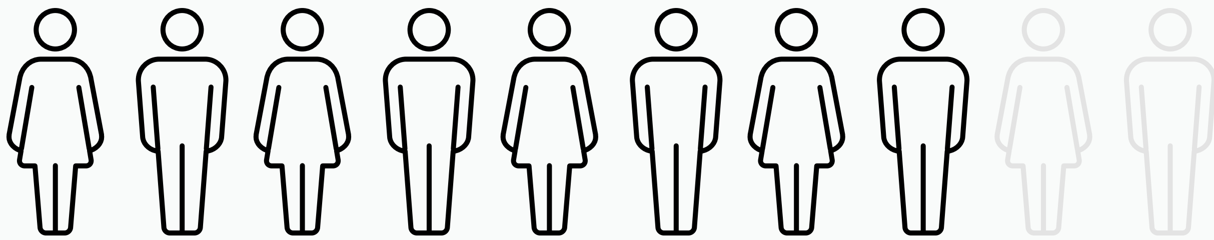
58 percent of the consumers surveyed think it is important that a product indicates its total life cycle CO_2 emissions.

A majority (58 percent) of consumers also believe that it is important that a product indicates its total life cycle CO_2 emissions. Responses differ according to level of education, as 46 percent of respondents who have completed secondary education consider this important, compared to 62 percent of those with a university degree. Labeling a product's total CO_2 emissions is also given higher priority by women. Out of the women surveyed, 62 percent believe that this is important or very important, compared to 54 percent of the men.

“

Carrying out a life cycle assessment of a product requires close cooperation throughout the entire chain – from extraction of raw materials to recycling, including transport and energy consumption. Many companies now have tools for making approximate calculations of the CO_2 emissions of products, and I believe that it will become increasingly important to be able to provide such information in the future. We continuously work to help companies optimize production and recycling processes to lower overall CO_2 emissions and reduce climate impact. One example is our new CO_2 Impact service, which is the result of traceability becoming increasingly important for our customers. The service helps companies determine the carbon footprint of their waste management, which is an important part of the life cycle assessment.

Anna Sundell, Head of Sustainability & Communications at Stena Metall



8 out of 10 value durable products that can be easily repaired or reused

DEMAND HIGHER THAN SUPPLY

Three out of four consumers consider it important or very important that producers use recycled material. The highest figure is found in Poland, where 81 percent have this view. Of these, a majority (51 percent) consider it very important. Sweden is a close second with 74 percent. Consumers in Norway put slightly less value on the use of recycled materials in products, with 63 percent finding it important or very important. Only 3 percent of the respondents in the five countries consider it to be of no importance at all.

The recyclability of a product is considered important or very important according to two out of three consumers. This has the greatest significance for women – 72 percent – compared to 64 percent of the men. There are also differences between age groups. Among consumers aged 18-29, 57 percent feel that this is important, compared to 72 percent in other age groups.

According to the survey, demand for sustainable products among consumers is high. But how well does supply really match demand? Norway and Denmark are the countries where consumers are most satisfied with the range of sustainable products. More than 60 percent in both countries believe that there are many products available for a sustainable lifestyle. In other countries, the figure is somewhat lower, and Sweden is the country with the highest share – 21 percent – of consumers considering the range of climate-smart products insufficient.

Consumers clearly place great value on circular and sustainable products, and demand doesn't look set to fall in the future – rather the reverse. The social crises in recent years have also demonstrated exactly why we need to take a more circular approach and take advantage of the raw materials we have already used. The survey points to an obvious deficiency that producers need to work to remedy. This means that there are plenty of opportunities for companies choosing to invest more in circularity, as demand currently outweighs supply. A proactive approach to sustainability will probably be a major competitive advantage in the future. This is why the work to develop a well-thought-out strategy throughout the entire chain needs to be done now.

Anna Sundell, Head of Sustainability & Communications at Stena Metall

ABOUT DEMAND AND DESIGN

It's interesting that the survey shows a great desire to use recycled products, but that many believe that supply is falling short. I think it's important that companies listen to consumers when it comes to sustainability and take their views into account – have an open dialogue. However, in order for industry as a whole to be able to widen the range of recycled products, more collected materials and designs are needed, focusing on both quality and cost. But you also need to design products made from recycled materials in a way that ensures they are as appealing and attractive as any other product.

Knowledge sharing and collaboration are also prerequisites for the industry's circular development. This will require established collaborations where everyone agrees to invest more in sustainability and design for recyclability – something that will get done faster if we work across industry boundaries. Circular business models work better with a shared focus on value. But even proximity, such as collaboration within national borders, is a factor. Strong collaborations can ensure high quality while also enabling us to reduce costs and increase value for consumers – three crucial pieces of the puzzle to fulfill consumers' needs and desires both today and tomorrow.

Vanessa Butani, VP of Group Sustainability at Electrolux Group

LARGE DIFFERENCES IN RESPONSIBILITY BETWEEN COUNTRIES

Although many consumers and manufacturing companies have high ambitions for circularity in production and consumption, we are not quite there yet. Who really bears the greatest responsibility, according to consumers? Overall, the largest share of respondents – 35 percent – believe that it is primarily the business community that should push increased use of recycled materials in the manufacturing process. The least responsibility is placed on researchers, who are identified as having the greatest responsibility by 11 percent of respondents. But there are significant differences between the countries.

In Sweden and Norway, the largest number of respondents think that politicians and authorities have the most crucial role to play in promoting increased use of recycled material in products. This is stated by 30 and 29 percent of respondents respectively. Finland and Poland believe that the greatest responsibility lies with the business community. This is the view of 50 and 38 percent of respondents respectively. The Danish respondents, on the other hand, place the greatest responsibility on themselves. In Denmark, the largest share – 30 percent – believe that consumers have the greatest responsibility for increasing the use of recycled materials.

“

It’s interesting to see such major differences between the countries in where you place the greatest responsibility. Everyone in the chain – from design and production to consumption and recycling – is an important piece of the puzzle in achieving a circular economy in general. Although every individual needs to take responsibility, what is required above all are initiatives by decision-makers and the business community to help consumers live a more circular life.

Anna Sundell, Head of Sustainability & Communications at Stena Metall

“

ABOUT SHARED RESPONSIBILITY AND ENERGY EFFICIENCY

Faced with today’s major challenges of meeting global CO_2 emission targets while also managing the growing demand for energy, industry and commerce have stepped up and clearly shown that they are prioritizing sustainability initiatives. This is something that politicians must support and facilitate to ensure proactive implementation that also works in practice.

One example of an area that has a big positive impact is energy efficiency, where the technology already exists to reduce electricity consumption in the manufacturing industry. Industry accounts for nearly 40 percent of Sweden’s electricity consumption and two-thirds of this usage is accounted for by electric motors – motors that may have been in service for 40 or 50 years.

By carrying out digital measurements and analyzing which of these motors fall short of optimal performance, a recycling concept now exists, where Stena Recycling is able to handle these end-of-life motors and recover 98 percent of the metals contained within these products. Metals that can then be reused in new products on the market – a good example of an energy-efficient and sustainable recycling loop.

Ulf Hellström, Local Business Area Manager at ABB

HOW THE SURVEY WAS CONDUCTED

The survey was performed in May 2023 by the research company Origo Group and data was collected using online panels. Respondents typically spent approximately five minutes to complete the survey. The target group – consumers between the ages of 18 and 65 in Sweden, Norway, Denmark, Finland and Poland. A total of 5,064 respondents completed the survey: 1,011 in Sweden, 1,012 in Norway, 1,010 in Denmark, 1,015 in Poland, and 1,016 in Finland. Results are weighted by the demographic variables country, age, gender, educational level, and income in order to obtain nationally representative results.

Share figures in graphs and tables have been rounded to nearest integer.

Origo Group has its own online panel, the Origo Group panel, which currently consists of around 20,000 active members and continues to grow throughout Sweden. New participants are continuously being recruited to the panel. Recruitment takes place via telephone interviews in connection with representative surveys among the general public. The members can choose when and how often they want to respond to surveys, but members will not be invited to participate in a new survey for a period of at least 10 days after completing a survey.

This survey used Origo's own panel, as well as other panels that are part of the Cint Opinion Hub platform to reach respondents in all the countries relevant to this survey. All panels on the Cint platform comply with ESOMAR's recommendations for online market research.

CONTACT

Press contact: Jesper Waltersson, Senior Manager

Sustainability & Communications, Stena Metall

+46 (0)70 511 26 70

jesper.waltersson@stenametall.se

INTRODUCTION TO THE RESULTS

The questions were asked in the form of statements. Respondents were asked to respond to each statement using a scale of 1 to 5, where 5 is "Strongly Agree" and 1 is "Strongly Disagree". Responses 4+5 are called Top 2 Box score = T2B, and responses 1+2 are called Bottom 2 Box score = B2B.

Results have been weighted by age, gender, and region. This means that the results are based on the population figures for each country in order to reflect reality as closely as possible.

A statistical analysis of the differences compared to last year's survey has been carried out. Statistically significant differences are pointed out in the results as "Sign." The differences can be positive or negative and are based on a confidence interval of 5 percent.

CONCLUSIONS

COMMITMENT TO RECYCLABILITY REMAINS IMPORTANT

Many of the results from this year's survey are stable and the same as last year. A large share of end consumers still think it is very important that manufacturers use recycled materials and that the product is recyclable. A majority of consumers still believe that the use of circular materials and recyclability are important or very important when assessing products. There is a continuing commitment to sustainability issues.

It is still of great importance that there is clear consumer information/labeling indicating that the product is made from recyclable materials. This is also one of the most important factors for end consumers in assessing whether a product is sustainable. Difficulties understanding whether the product is made from recyclable materials and price are the main barriers to the transition to a more sustainable and climate-friendly lifestyle.

The product's potential for a long service life, easy repairability and low energy consumption are seen as important factors influencing consumer purchase decisions.

However, the consequences of higher household costs have resulted in a clash between values and reality – affecting behaviors.

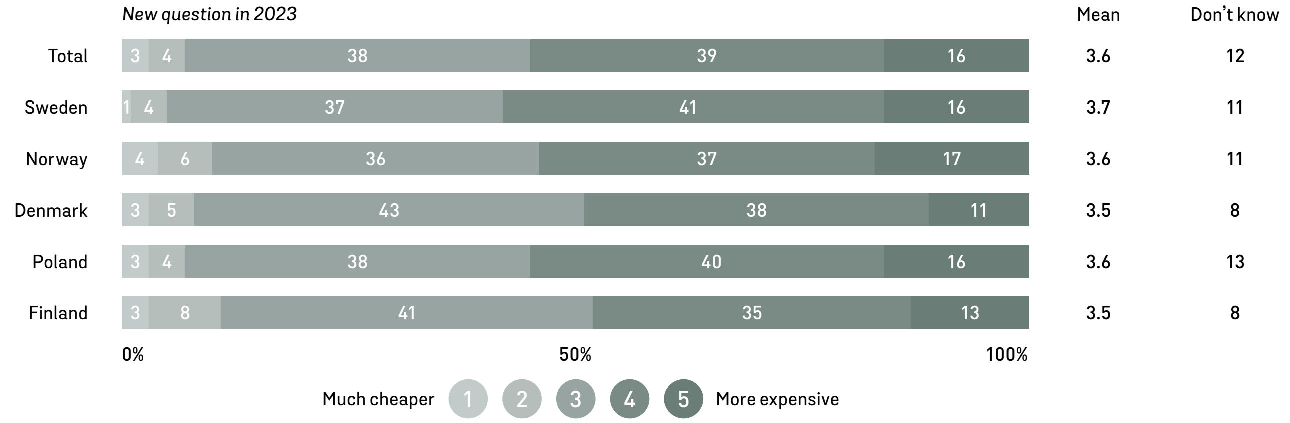
Reality, in the form of last year's price increases, has affected consumer behavior. One in four end consumers have purchased fewer recyclable products. In this year's survey, fewer consumers are willing to pay more for an environmentally friendly product, and fewer are refusing to buy products or brands that are incompatible with their sustainability values.

End consumers want to make the right choice from an environmental perspective, but the economic crisis has affected consumer behavior. Our own finances come first.

RESULTS OVERALL AND BY COUNTRY – COST OF LIVING

IN RELATION TO OTHER PRODUCTS, DO YOU CONSIDER RECYCLABLE PRODUCTS TO BE CHEAPER OR MORE EXPENSIVE? (5-POINT SCALE)

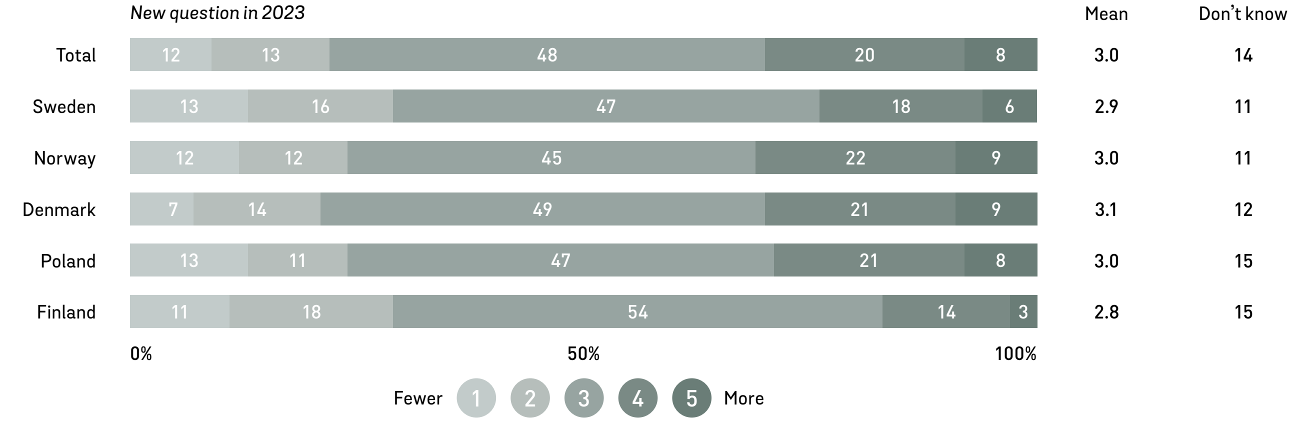
55 percent of respondents consider recyclable products to be more expensive in relation to other products. The figure was slightly higher in Sweden (57 percent) and Poland (56 percent), compared to Denmark (49 percent) and Finland (48 percent).



HOW HAVE THE PRICE INCREASES FOR PRODUCTS AND SERVICES IN THE PAST YEAR AFFECTED YOU WHEN IT COMES TO BUYING RECYCLABLE PRODUCTS?

25 percent have purchased fewer recyclable products due to price increases in the past year. The figure is slightly higher in Sweden (29 percent) and Finland (29 percent), and lower in Denmark (21 percent). A higher share of both men and women in Sweden and Finland purchased fewer recyclable products because of price increases.

There is a correlation between lower income and fewer purchases of recyclable products.



Percentage who bought fewer recyclable products (T2B) (%)	Men	Women	18–29 years	30–39 years	40–49 years	50–65 years
Total	23%	28%	27%	24%	24%	25%
Sweden	28%	30%	27%	31%	31%	27%
Norway	22%	28%	25%	21%	38%	24%
Denmark	22%	21%	21%	22%	18%	25%
Poland	20%	27%	29%	21%	22%	24%
Finland	27%	32%	28%	32%	32%	26%

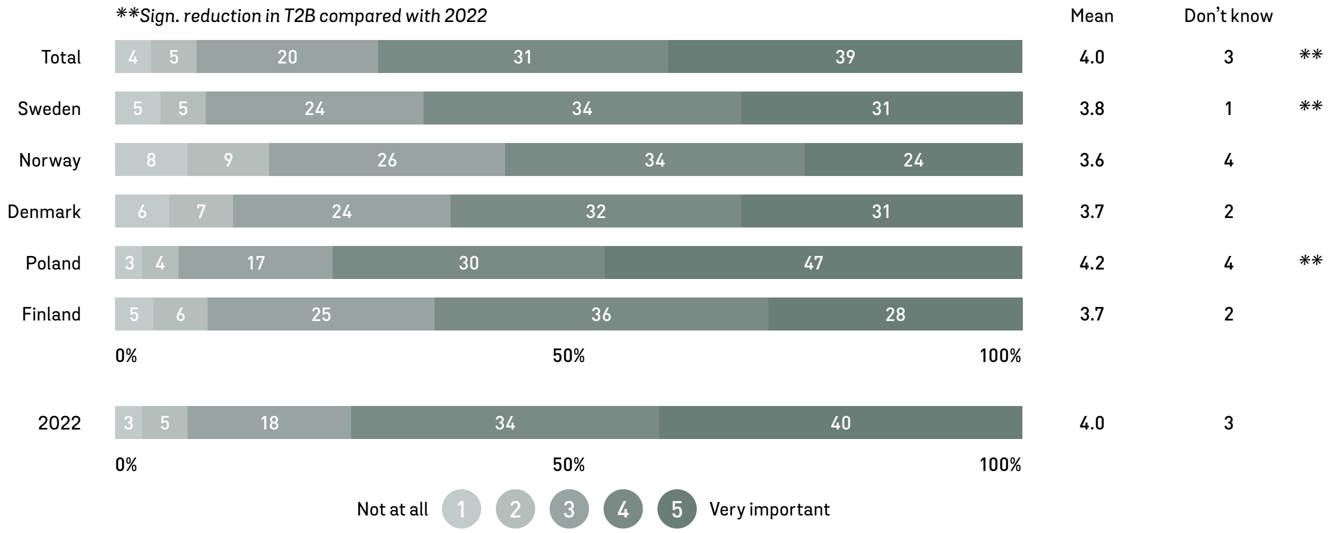
Percentage who bought fewer recyclable products (T2B) (%)	EUR 0–1,299	EUR 1,300–2,164	EUR 2,165–3,899	More than EUR 3,900
Total	27%	23%	25%	17%

Percentage who bought fewer recyclable products (T2B) (%)	Secondary school education	Upper secondary school	University or equivalent
Total	25%	26%	24%

HOW IMPORTANT IS IT TO YOU THAT THERE IS A WIDE RANGE OF PRODUCTS FOR A SUSTAINABLE/CLIMATE-SMART LIFESTYLE?

70 percent believe that a wide range of sustainable products is important or very important. This is a significant reduction compared to 2022 – in total, as well as in the results for Sweden and Poland. The largest share, 47 percent, of Polish respondents consider a wide range of sustainable products to be very important.

In Sweden, significantly more respondents said that this is not important (1 and 2) this year compared to last year – up from 7 percent in 2022 to 10 percent in 2023.

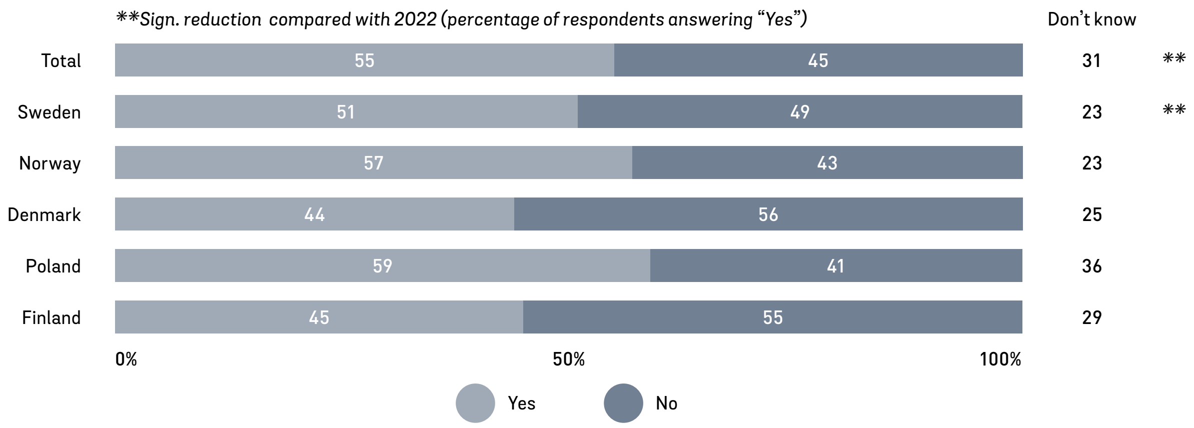


SHOULD THE MANUFACTURE AND SALE OF PRODUCTS THAT CANNOT BE RECYCLED BE PROHIBITED?

Around 55 percent believe that it should be forbidden to manufacture and sell products that cannot be recycled. This share is larger in Norway (57 percent) and Poland (59 percent). It is lowest in Denmark (44 percent) and Finland (45 percent).

A significantly smaller share overall and in Sweden support banning the manufacture and sale of products that cannot be recycled, compared to 2022.

A large share of respondents have no opinion (don't know).



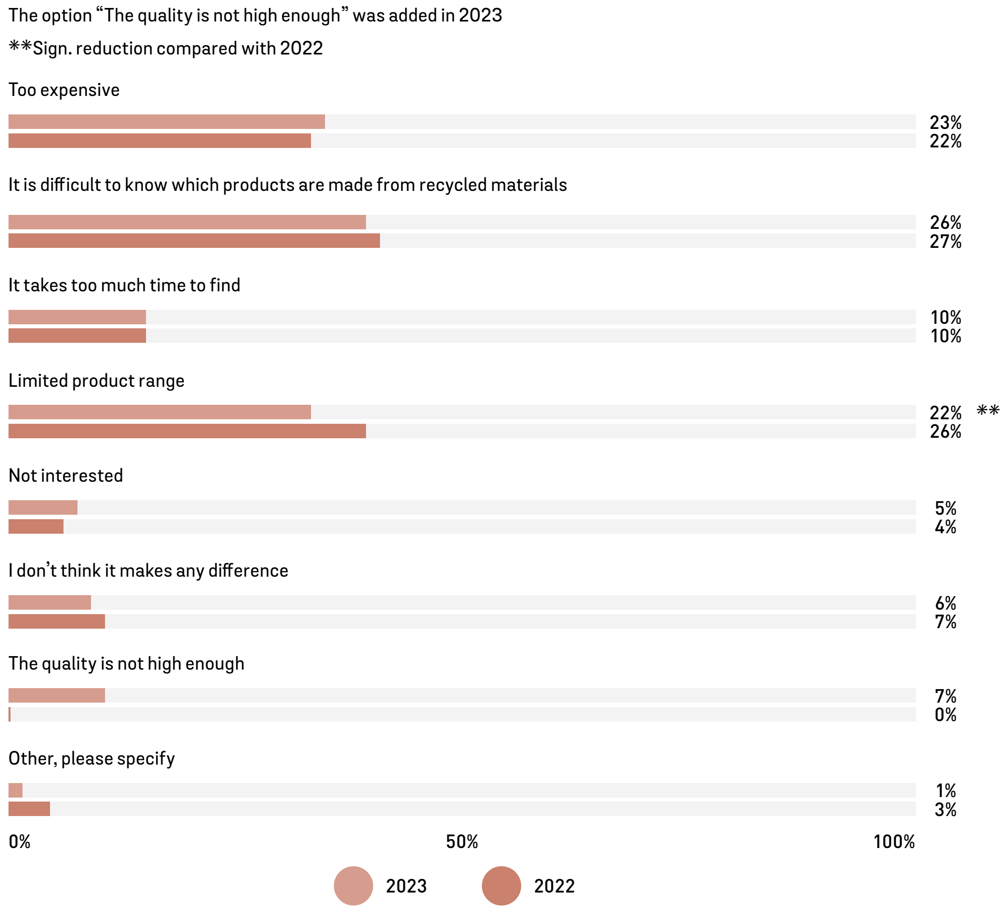
WHAT IS THE MAIN BARRIER KEEPING YOU FROM BUYING MORE PRODUCTS MADE FROM RECYCLED MATERIALS?

Difficulty understanding which products are made from recycled materials and price, together with limited product range, are the main barriers to buying more products made from recycled materials.

In 2023, fewer people see the range of products as a barrier compared to 2022.

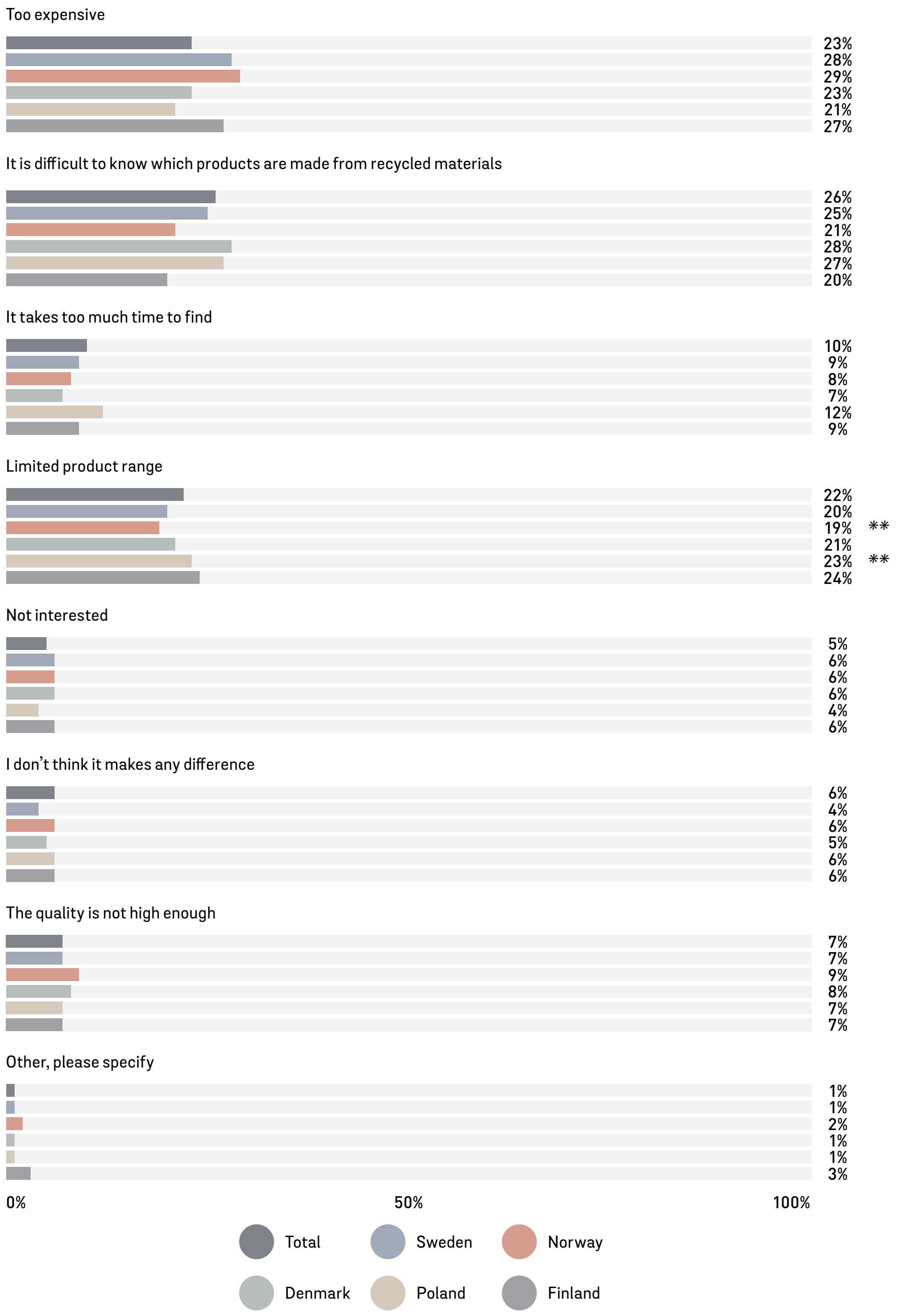
For young people (18–29 years), price is the most common barrier (28 percent).

In Sweden, Norway and Finland, price is considered the largest barrier to buying more products made from recycled materials. In Denmark and Poland, the largest obstacle is that it is difficult to understand which products are made from recycled materials.



The option "The quality is not high enough" was added in 2023

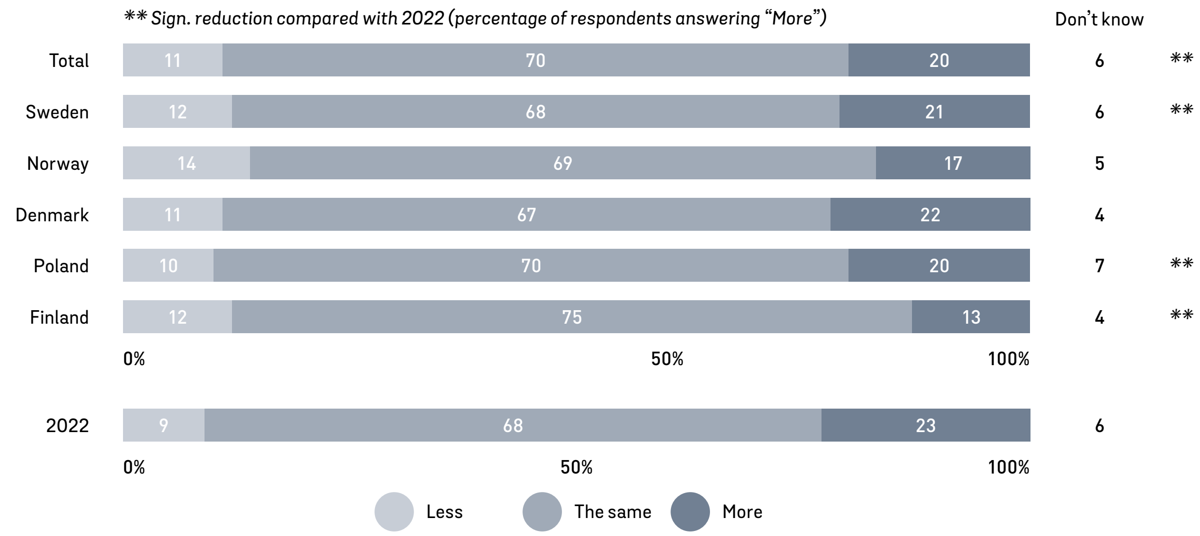
**Sign. reduction compared with 2022.



WHAT ARE YOU WILLING TO PAY FOR A PRODUCT THAT IS MADE FROM RECYCLED MATERIALS AND IS RECYCLABLE?

Overall, fewer people are willing to pay more for sustainable products this year than last year. There is a significant difference compared to 2022; this applies overall and for Sweden, Poland and Finland. In Sweden and Poland, around 20 percent are now willing to pay more. Most consumers, 70 percent, are willing to pay the same amount.

In Denmark, it is primarily younger men (18-29 years) who are willing to pay more for sustainable products (28 percent).



IN RECENT YEARS, HAVE YOU REJECTED PRODUCTS OR BRANDS THAT YOU DO NOT THINK MEET YOUR SUSTAINABILITY VALUES?

Significantly fewer consumers reject products or brands that are inconsistent with their sustainability values in 2023 compared to 2022. Significant reduction overall, as well as in Sweden, Poland, and Finland (smaller percentage answering "Yes").

Younger people (18-29 years) tend to reject products or brands that are not consistent with their sustainability values to a greater extent than older people (50-65 years). 48 percent and 28 percent respectively state that they have done so in the past year.

**Sign. reduction compared to 2022 (percentage of respondents answering "Yes")

	Yes	No	Don't know	
Total	38	62	21	**
Sweden	44	56	16	**
Norway	41	59	18	
Denmark	34	66	14	
Poland	36	64	24	**
Finland	42	58	17	**
2022	51	49	24	

TO WHAT EXTENT ARE YOU WILLING TO ADAPT YOUR CONSUMPTION OF PRODUCTS TO CONTRIBUTE TO REDUCED CLIMATE IMPACT?

A majority of respondents (56 percent) state that they are willing to "Adapt" or "Fully adapt" their consumption to reduce climate impact. However, this is a significant reduction both overall and in Sweden, Poland and Finland compared to 2022.

28 percent of respondents aged between 30 and 39 in Denmark state that they are willing to "Fully adapt" (5) their consumption of products to reduce climate impact.

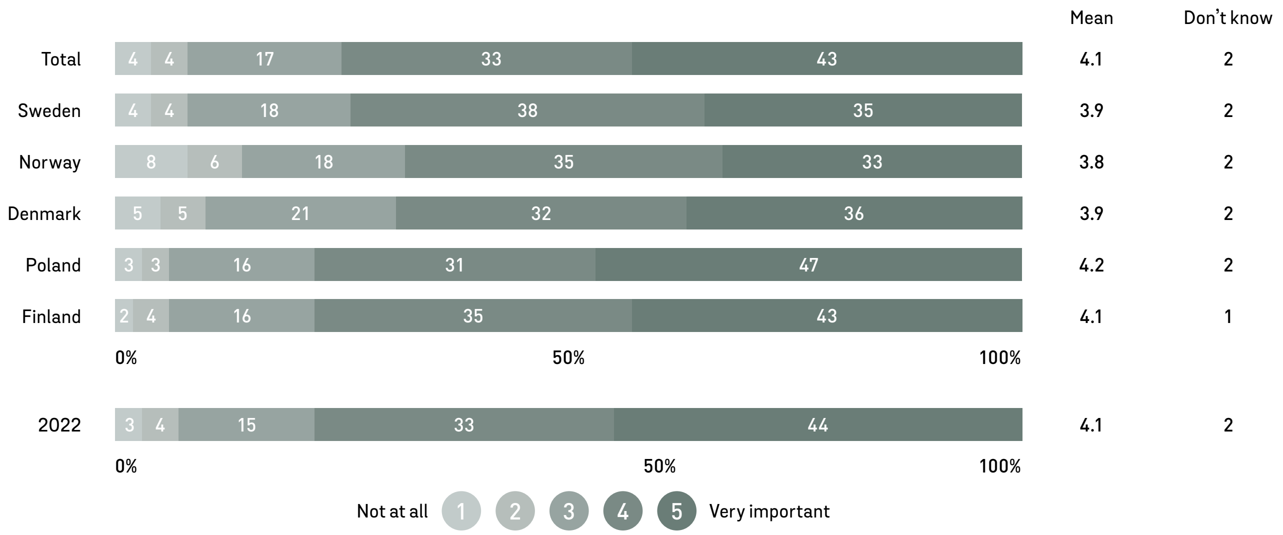
**Sign. reduction in T2B responses compared with 2022

	1 (Not adjust at all)	2	3	4	5 (Totally adjust)	Mean	Don't know	
Total	4	7	31	41	16	3.6	5	**
Sweden	5	7	34	39	15	3.5	4	**
Norway	7	8	31	39	15	3.5	5	
Denmark	4	8	31	38	19	3.6	4	
Poland	4	6	30	43	17	3.6	5	**
Finland	6	9	34	39	12	3.4	4	
2022	3	5	27	48	17	3.7	4	

RESULTS OVERALL AND BY COUNTRY – INFORMATION

HOW IMPORTANT IS IT TO YOU THAT A PRODUCT IS CLEARLY LABELED “MADE FROM RECYCLED MATERIALS”?

Three out of four believe that clear information that a product is made from recycled materials is “Important” or “Very important”. The same result as last year, no significant changes.



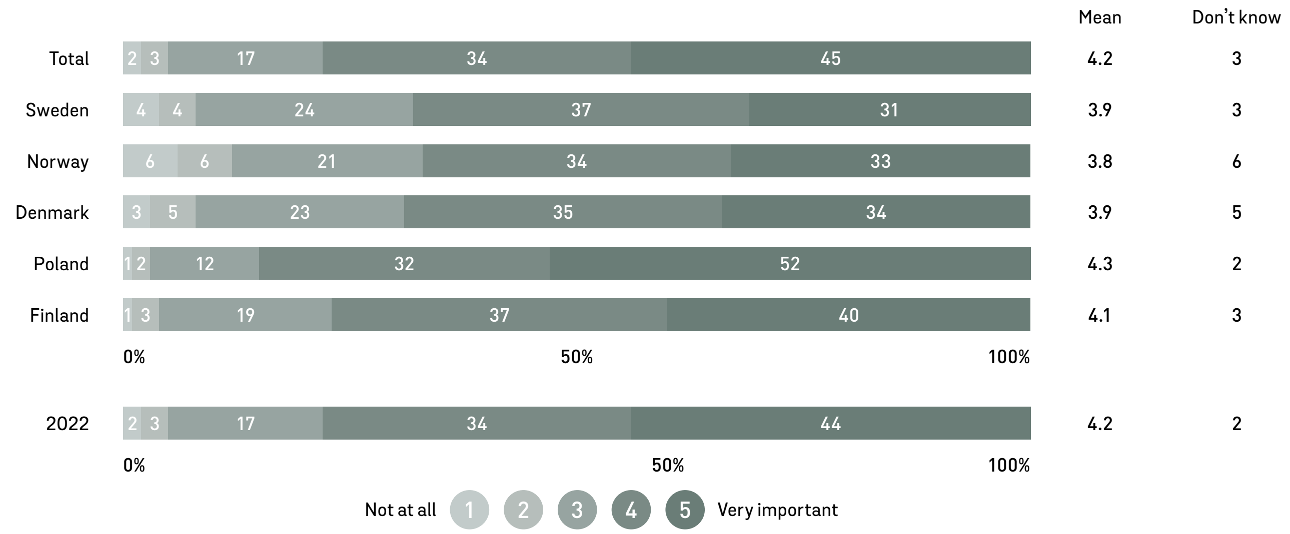
WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT ARE VARIOUS FACTORS?

Easy to understand product information, easy to repair and low energy consumption – these are the factors considered to be the most important when assessing whether a product is sustainable. In the respondents' view, the product being made from recycled materials is the least important factor among the response options.

Importance of various factors when assessing the sustainability of a product (%)	B2B (Not important)	T2B (Important)	Differences between countries
Easy to understand product information	5%	79%	Higher in Poland and Finland, lower in Sweden, Norway and Denmark
Made of recycled material	9%	64%	Significant reduction (overall and in Sweden and Poland) compared to 2022
Easy to recycle	8%	74%	Significant reduction (overall and in Sweden and Poland) compared to 2022
Easy to service	5%	77%	Significant increase in Denmark
Low energy consumption when product is in use	5%	77%	
Manufactured responsibly	6%	74%	Significant reduction (overall and in Finland) compared to 2022

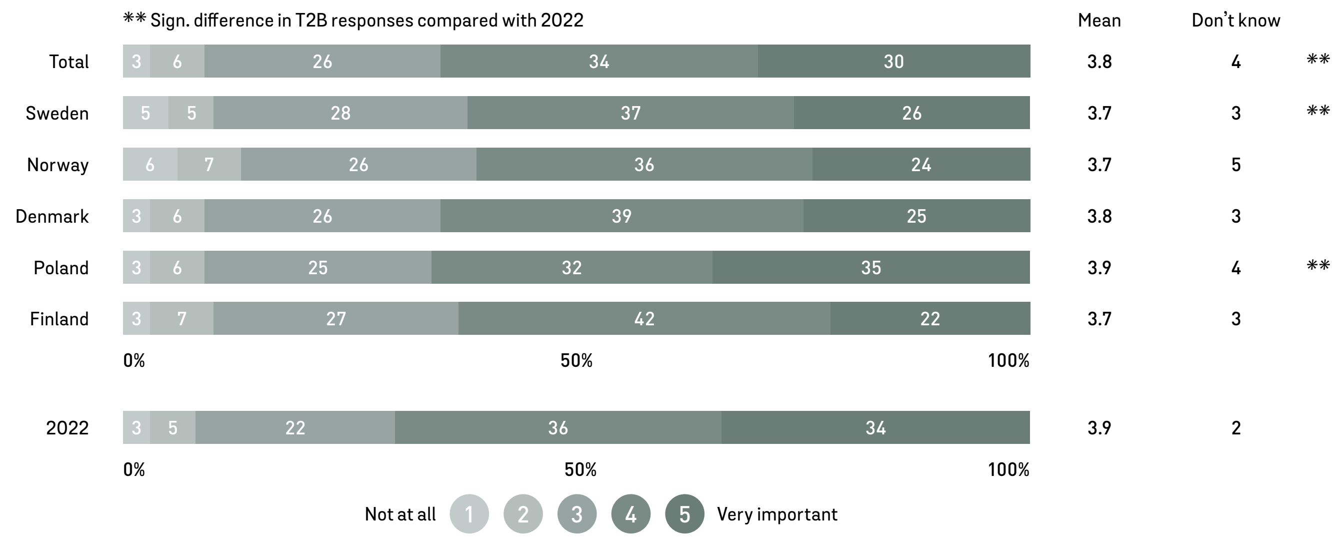
WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS IT THAT PRODUCT INFORMATION IS EASY TO UNDERSTAND?

79 percent consider easy-to-understand product information to be “Important” or “Very important” when assessing whether a product is sustainable. No significant changes compared to 2022. 83 percent of respondents aged 50-65 consider easy-to-understand product information to be “Important” or “Very important”.



WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS IT THAT IT IS MADE FROM RECYCLED MATERIAL?

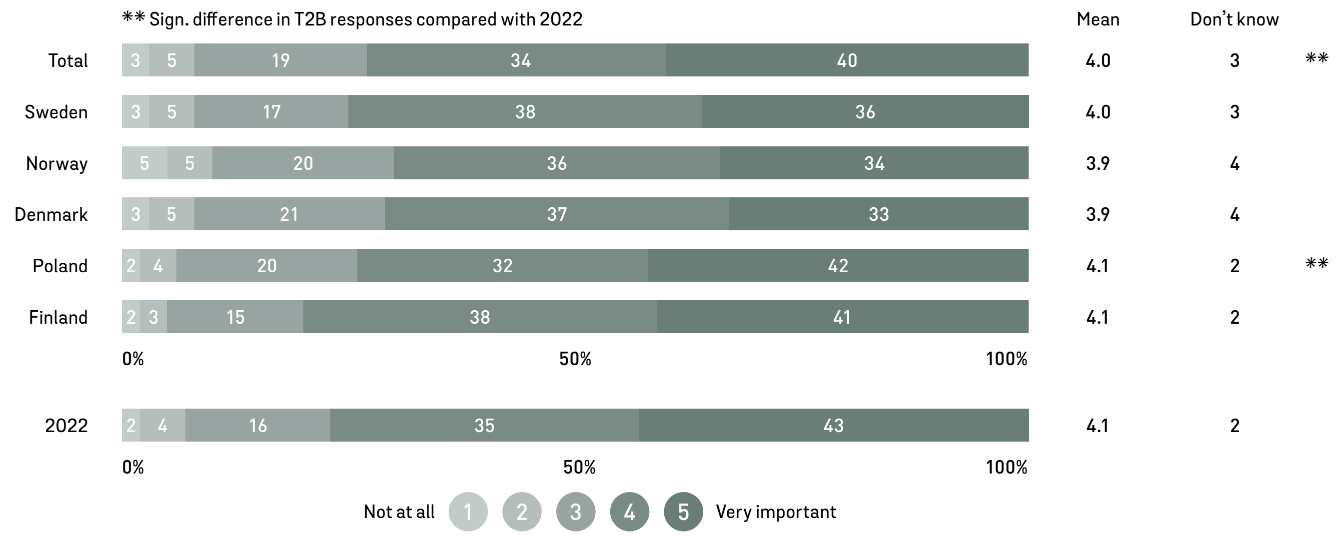
64 percent consider it “Important” or “Very important” that the product is made from recycled material when assessing its sustainability. Significant reduction compared to 2022 (overall as well as in Sweden and Poland).



WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS IT THAT IT IS EASY TO RECYCLE?

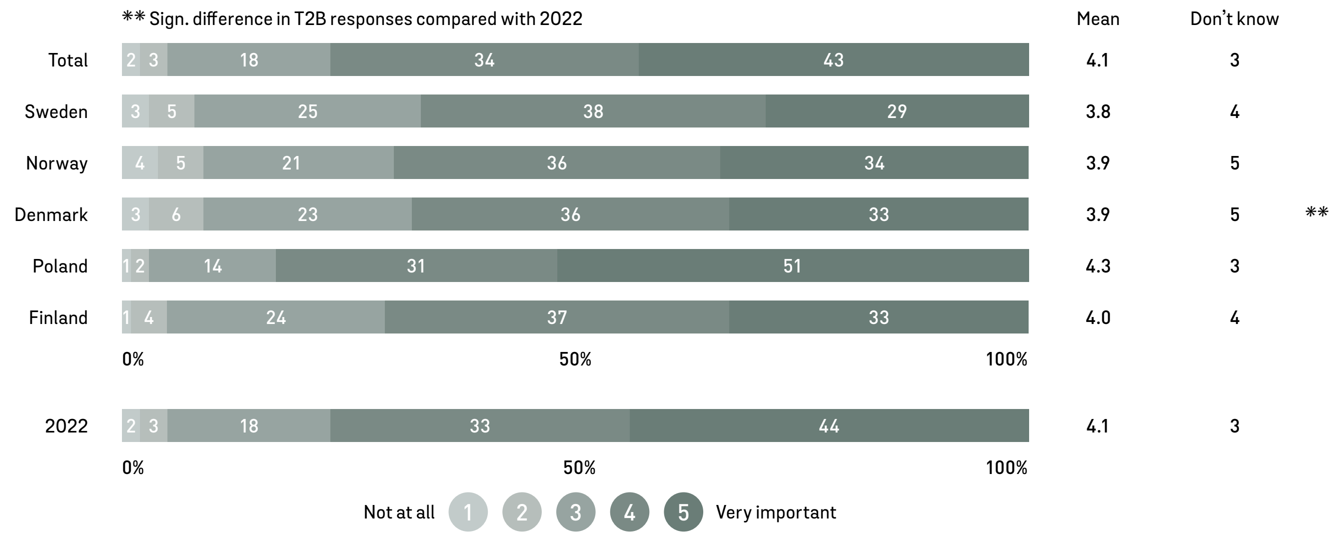
74 percent consider the recyclability of the product (how easy it is to recycle) to be "Important" or "Very important" when assessing its sustainability. Significant reduction compared to 2022 overall and in Poland.

89 percent of women aged 50-65 years in Finland consider the recyclability of the product to be "Important" or "Very important" when assessing its sustainability.



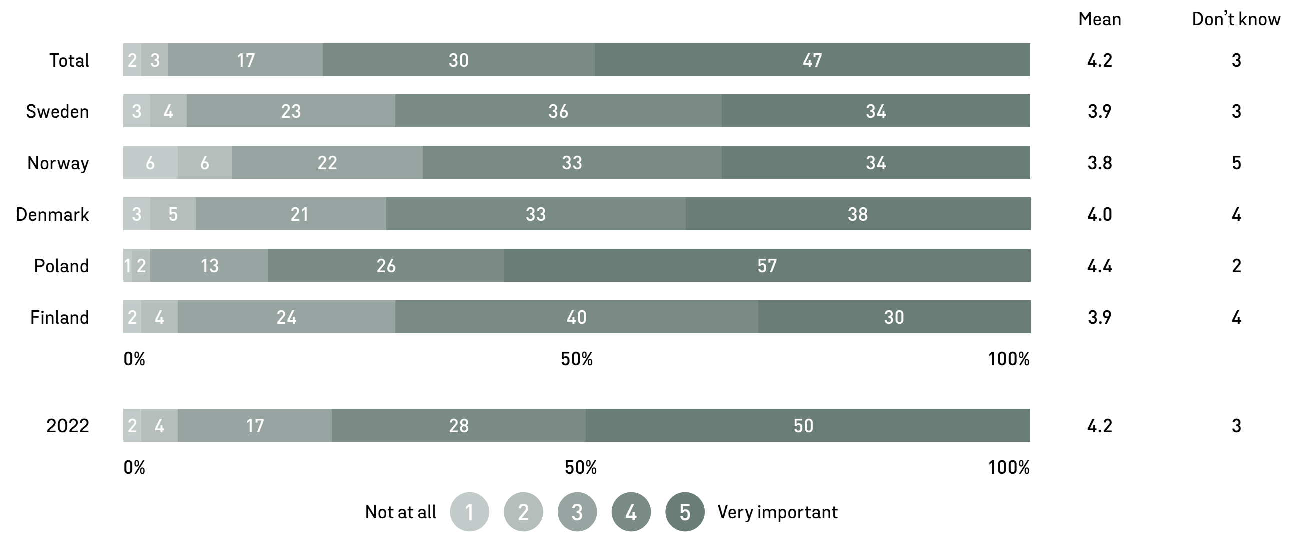
WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS IT THAT IT IS EASY TO REPAIR?

77 percent think it is "Important" or "Very important" that the product is easy to repair when assessing its sustainability. Significant increase in Denmark.



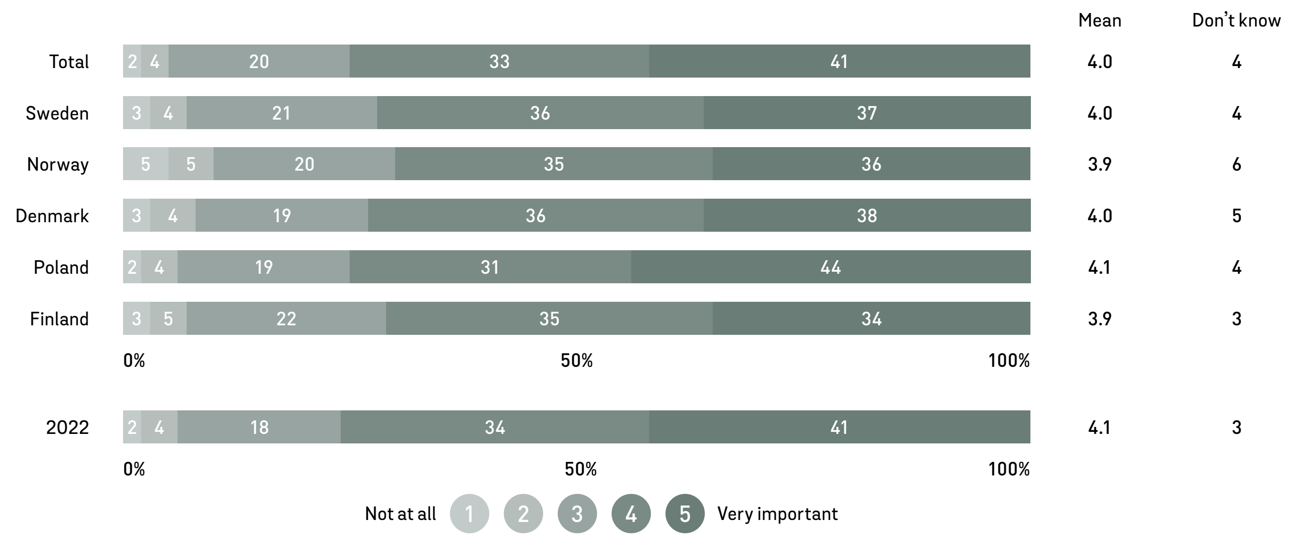
WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS THE PRODUCT'S ENERGY CONSUMPTION?

77 percent consider the product's energy consumption to be "Important" or "Very important" when assessing its sustainability. Despite the increased energy costs in the Nordic countries, the Polish public still considers energy consumption to be more important than the Nordic respondents. No significant differences compared to 2022.



WHEN YOU ASSESS WHETHER A PRODUCT IS SUSTAINABLE, HOW IMPORTANT IS IT THAT THE PRODUCT HAS BEEN MANUFACTURED IN A RESPONSIBLE WAY?

74 percent think it is "Important" or "Very important" that the product has been made in a responsible way when assessing its sustainability. No significant difference compared to 2022.



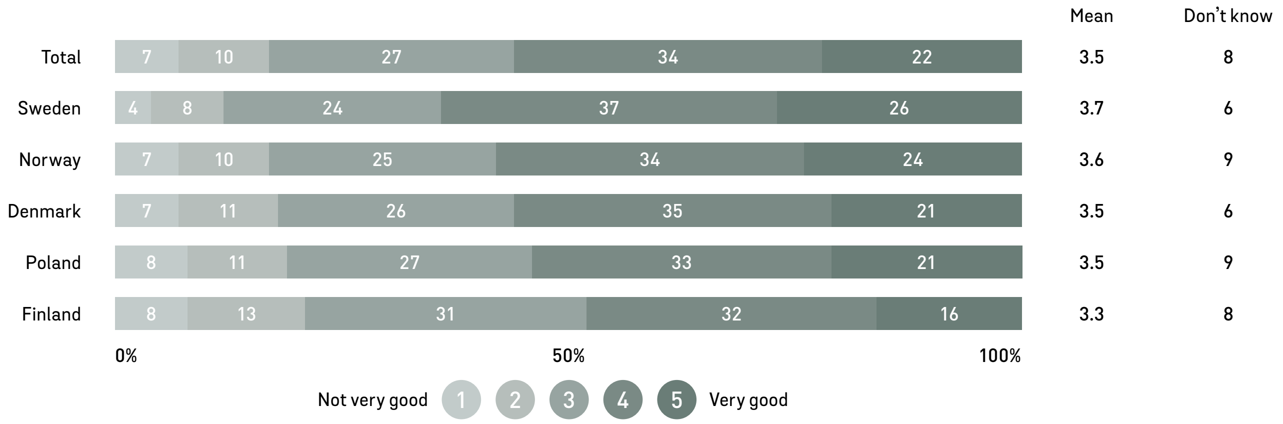
HOW GOOD DO YOU THINK THE FOLLOWING INDUSTRY SECTORS ARE AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

The furniture, sporting goods, and automotive industries are perceived to be worse at providing information about the recyclability of their products, while the food, clothing, and electronics industries are perceived to be better.

How good the different industry sectors are at providing information about the recyclability of their products (%)	B2B (Not important)	T2B (Important)	Differences between countries
Food	17%	56%	Higher in Sweden and lower in Finland
Clothing	22%	50%	
Electronics	22%	48%	Higher in Poland and Norway, lower in Sweden and Denmark
Automotive	32%	38%	
Sports and leisure equipment	30%	37%	Lower in Sweden and Finland
Furniture	29%	31%	Slightly lower in Sweden and Finland

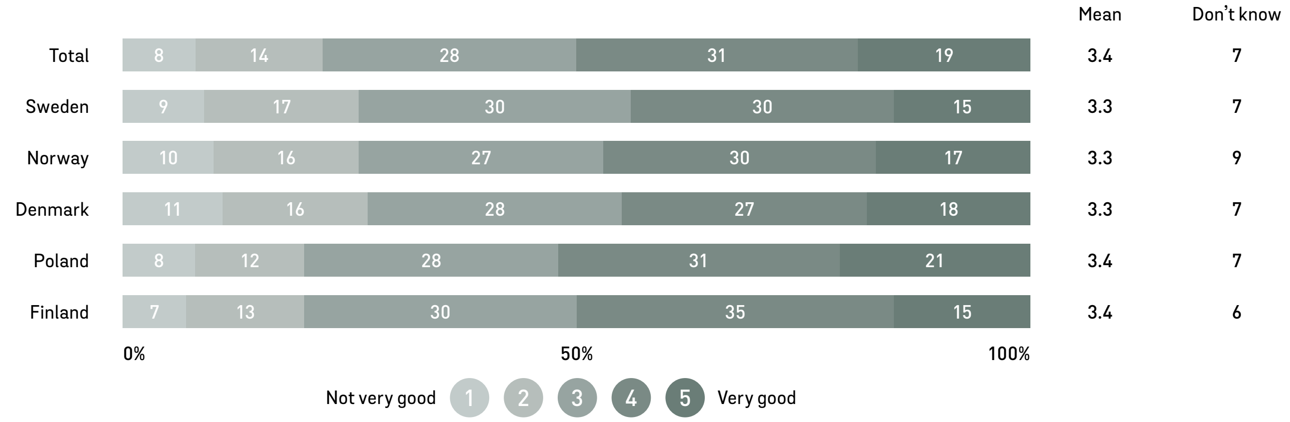
HOW GOOD DO YOU THINK THE FOOD INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

56 percent consider the food industry to be “Good” or “Very good” at providing information about the recyclability of their products.



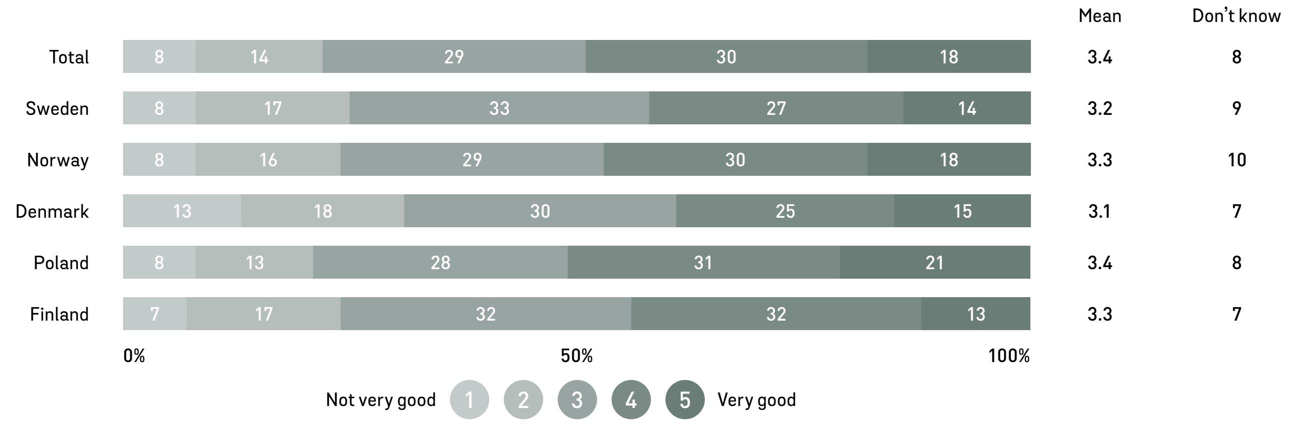
HOW GOOD DO YOU THINK THE CLOTHING INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

50 percent consider the clothing industry to be “Good” or “Very good” at providing information about the recyclability of their products.



HOW GOOD DO YOU THINK THE ELECTRONICS INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

48 percent consider the electronics industry to be “Good” or “Very good” at providing information about the recyclability of their products. In Denmark, the share of respondents who think the electronics industry is “Not good” or “Not at all good” is higher than in other countries.



HOW GOOD DO YOU THINK THE AUTOMOTIVE INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

38 percent consider the automotive industry to be “Good” or “Very good” at providing information about the recyclability of their products. Almost as high a share (32 percent) consider the automotive industry to be “Not good” or “Not at all good”.

	1	2	3	4	5	Mean	Don’t know
Total	13	19	30	24	14	3.1	13
Sweden	15	19	29	23	13	3.0	17
Norway	12	18	29	24	16	3.1	13
Denmark	17	18	26	26	14	3.0	10
Poland	13	18	31	24	15	3.1	13
Finland	12	20	33	22	12	3.0	12

0% 50% 100%

Not very good 1 2 3 4 5 Very good

HOW GOOD DO YOU THINK THE FURNITURE INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

31 percent consider the furniture industry to be “Good” or “Very good” at providing information about the recyclability of their products.

	1	2	3	4	5	Mean	Don’t know
Total	11	18	30	26	15	3.2	11
Sweden	11	18	35	22	13	3.1	11
Norway	9	19	29	27	16	3.2	11
Denmark	9	17	31	26	16	3.2	9
Poland	12	17	28	27	16	3.2	11
Finland	10	20	35	26	10	3.0	9

0% 50% 100%

Not very good 1 2 3 4 5 Very good

HOW GOOD DO YOU THINK THE SPORTING GOODS INDUSTRY IS AT COMMUNICATING THAT THEIR PRODUCTS ARE RECYCLABLE?

37 percent consider the sporting goods industry to be “Good” or “Very good” at providing information about the recyclability of their products. In Finland, a higher share (39 percent) consider the industry to be “Not good” or “Not at all good”.

	1	2	3	4	5	Mean	Don’t know
Total	12	18	33	24	13	3.1	13
Sweden	11	21	38	19	12	3.0	15
Norway	12	17	33	23	16	3.2	13
Denmark	15	21	29	23	13	3.0	13
Poland	12	16	32	26	14	3.1	12
Finland	12	27	35	18	8	2.8	14

0% 50% 100%

Not very good 1 2 3 4 5 Very good

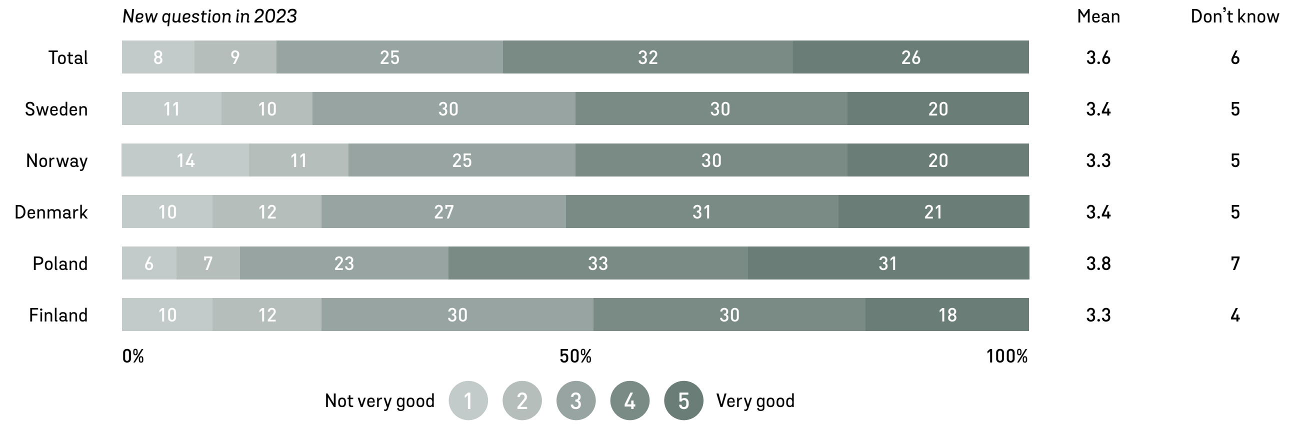
RESULTS OVERALL AND BY COUNTRY – ENERGY AND LONGEVITY

HOW IMPORTANT IS IT TO YOU THAT A PRODUCT CLEARLY STATES ITS TOTAL LIFE CYCLE CO_2 EMISSIONS?

More than half of the respondents consider it “Important” or “Very important” that the product states its total CO_2 emissions. Higher share in Poland (64 percent) compared to other countries.

People with a lower level of education consider it less important to state the total CO_2 emissions of a product than people with a higher level of education.

- A majority of women, and women to a greater extent than men (overall and in all countries except Norway), think it is important that a product states its total CO_2 emissions.
- This is considered most important in Poland, where the highest share of both men and women answered “Important” or “Very important” compared to other countries.



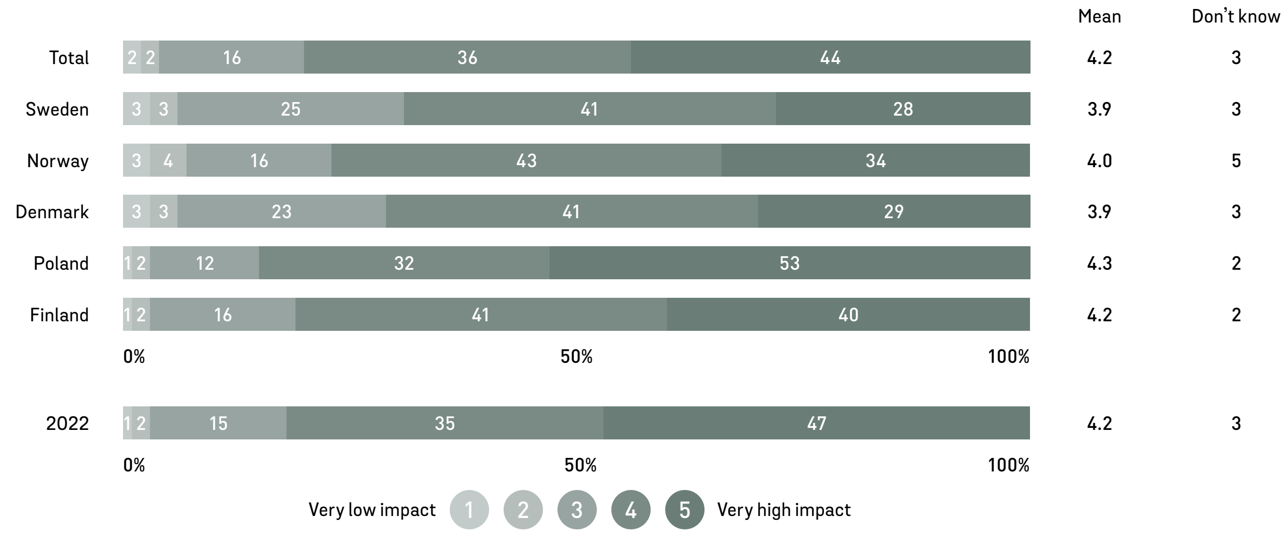
Importance of stating a product’s total CO_2 emissions (T2B) (%)	Men	Women	18–29 years	30–39 years	40–49 years	50–65 years
Total	54%	62%	53%	61%	62%	57%
Sweden	47%	52%	52%	51%	49%	47%
Norway	54%	46%	48%	63%	47%	47%
Denmark	50%	54%	59%	68%	56%	44%
Poland	59%	69%	54%	65%	70%	67%
Finland	44%	52%	59%	45%	44%	44%

Importance of stating a product’s total CO_2 emissions (T2B) (%)	EUR 0–1,299	EUR 1,300–2,164	EUR 2,165–3,899	More than EUR 3,900
Total	60%	62%	55%	60%

Importance of stating a product’s total CO_2 emissions (T2B) (%)	Secondary school education	Upper secondary school	University or equivalent
Total	46%	55%	62%

WHAT IMPACT DOES IT HAVE ON YOUR PURCHASE DECISION IF A PRODUCT HAS A LONG SERVICE LIFE, FOR EXAMPLE IS EASY TO REPAIR OR HAS PARTS THAT CAN BE REUSED?

80 percent believe that the potential long lifetime of a product has a “High impact” or “Very high impact” when making a purchase decision. Larger share in Poland (85 percent) and Finland (81 percent) compared to other countries (same differences between countries as last year). Smallest share in Sweden – 69 percent.

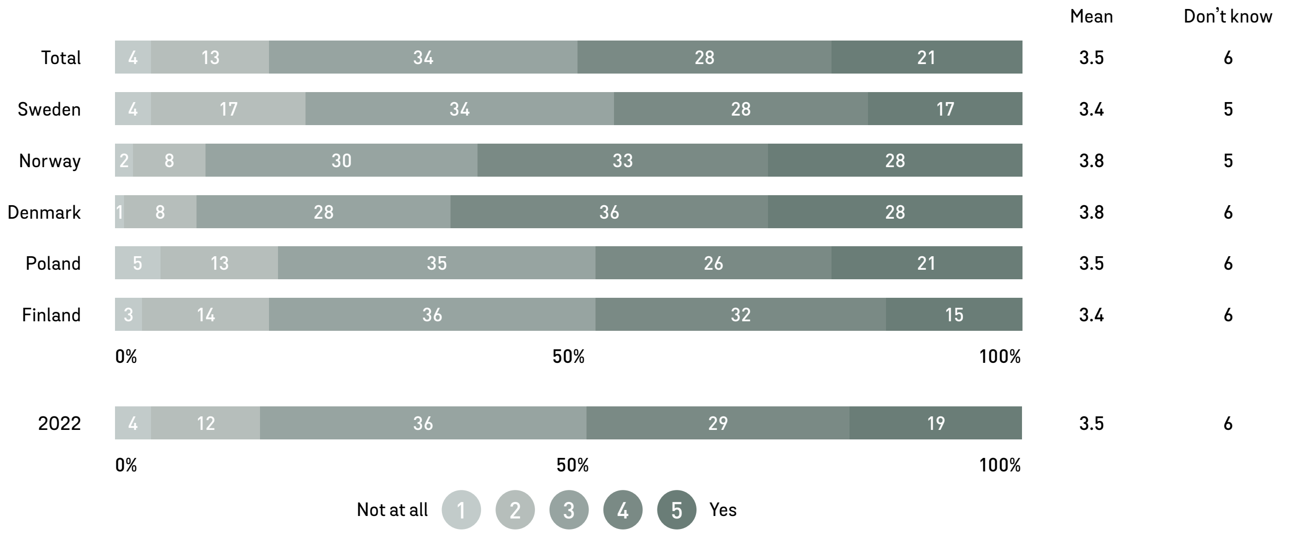


ADDITIONAL RESULTS – RECYCLABLE PRODUCTS

DO YOU BELIEVE THAT THERE IS A SUFFICIENT RANGE OF PRODUCTS FOR A SUSTAINABLE/CLIMATE-SMART LIFESTYLE

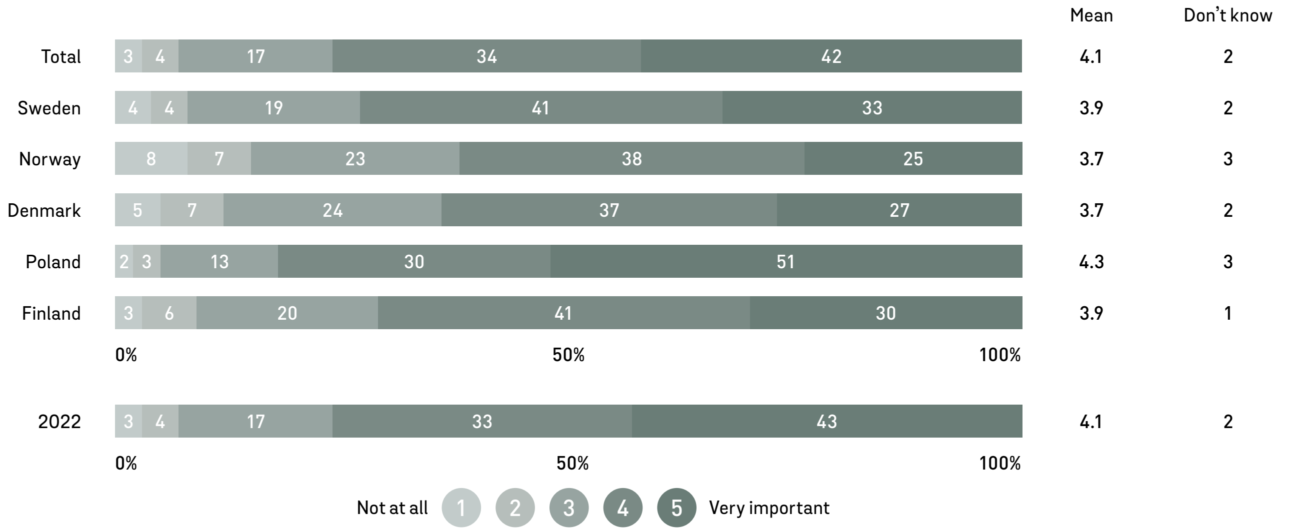
Norwegians and Danes are most satisfied with the range of sustainable products, the same as in 2022 (no significant changes). Around 60 percent of respondents in Norway and Denmark feel that there are sufficient products for a climate-smart lifestyle. In total, around 50 percent are satisfied with the availability of sustainable products.

In Sweden, Poland and Finland, 17 to 20 percent believe that there is an insufficient supply of products for a sustainable/climate-smart way of life.



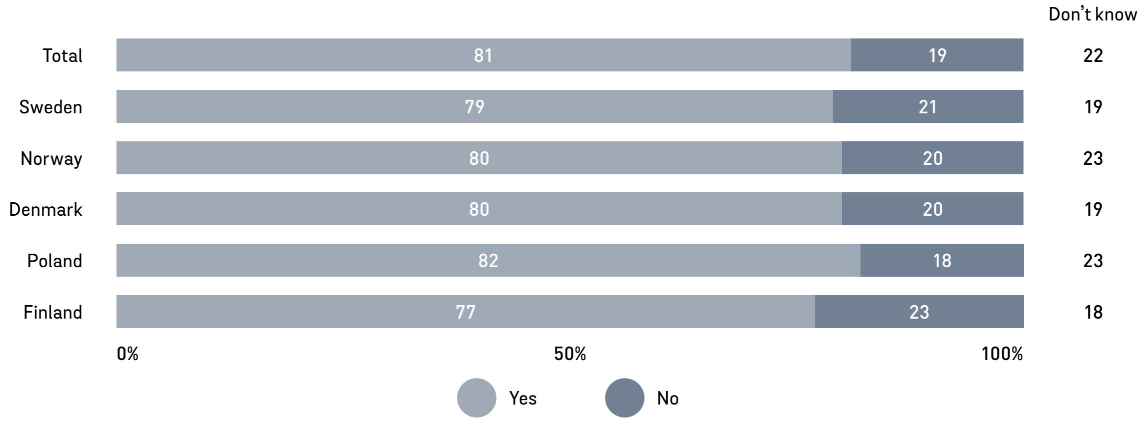
HOW IMPORTANT DO YOU THINK IT IS THAT MANUFACTURERS USE RECYCLED MATERIALS IN PRODUCTS?

75 percent of consumers consider manufacturers' use of recycled material to be "Important" or "Very important". In Poland – the country where the largest share of consumers consider it important – over 50 percent of consumers consider it to be "Very important", the same as in 2022 (no significant changes).



DO YOU THINK PRODUCTS MADE FROM RECYCLED MATERIALS ARE OF THE SAME QUALITY AS PRODUCTS MADE FROM VIRGIN RAW MATERIALS?

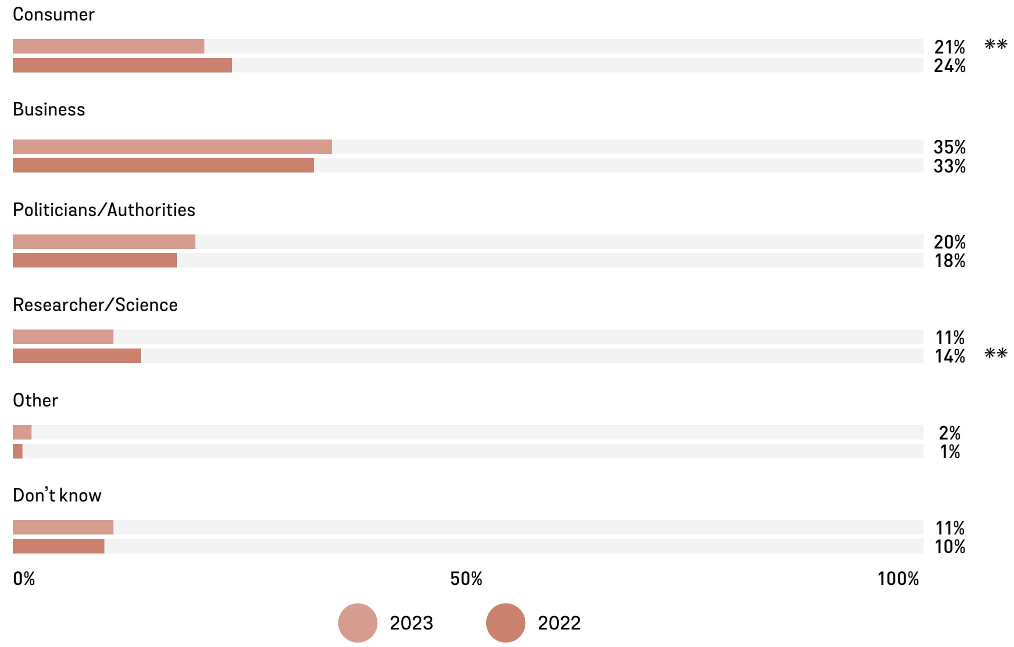
80 percent of respondents believe that products made from recycled materials are of the same quality as products made from virgin raw materials.



WHO DO YOU THINK HAS THE MOST IMPORTANT ROLE TO PLAY IN PROMOTING INCREASED USE OF RECYCLED MATERIALS IN DIFFERENT PRODUCTS?

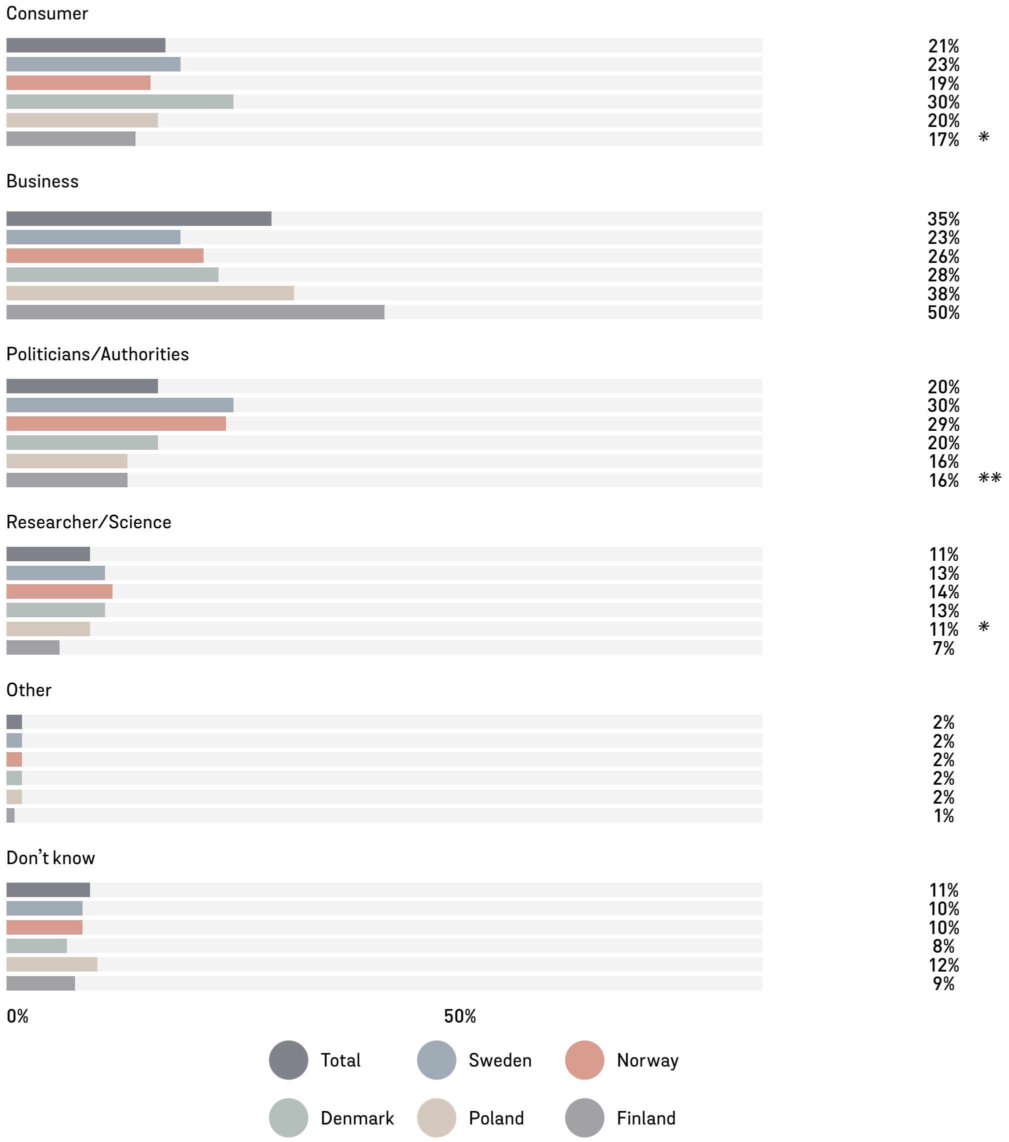
Overall, most people (just like in 2022) believe that the business community has the most important role to play in promoting increased use of recycled materials in product manufacturing. Men believe that politicians and authorities play a larger role (22 percent) than women (18 percent). The share that believes consumers play the main role has decreased compared to 2022 (significantly lower share overall).

**Sign. lower share of respondents in 2023 believe that consumers or researchers/science have the biggest role to play in promoting increased use of recycled materials, compared with 2022



In Sweden and Norway, the general public believes that politicians and authorities play the main role in the transition. In Poland and Finland, respondents consider the business community to play the most important role.

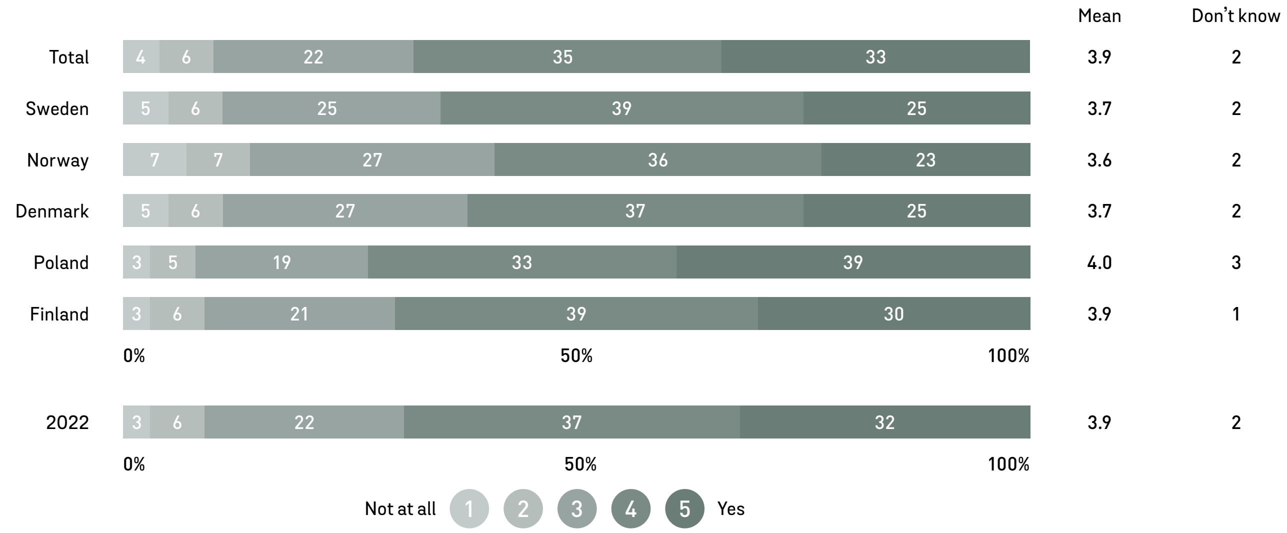
*Sign. reduction compared with 2022
Poland – respondents who believe researchers/science play the main role
Finland – respondents who believe consumers play the most important role
**Sign. increase compared with 2022
Finland – respondents who believe politicians/authorities play the most important role



HOW IMPORTANT IS IT THAT A PRODUCT YOU BUY CAN ALSO BE RECYCLED?

The recyclability of a product is an important factor. Two out of three respondents consider this recyclability of a product to be "Important" or "Very important". No significant changes compared to 2022.

- A larger share of women (overall and in all countries except Denmark) think this is important.
- A larger share of both men and women in Sweden and Finland think it is important compared to the other countries – especially Norway.
- Young people (18–29 years) on average care less about the recyclability of a product compared to the older age groups.
- There is a correlation between level of education and how much importance is placed on recyclability.



HOW IMPORTANT IS IT THAT A PRODUCT YOU BUY CAN ALSO BE RECYCLED – BY GENDER, AGE, INCOME AND LEVEL OF EDUCATION

Importance of recyclability (T2B) (%)	Men	Women	18–29 years	30–39 years	40–49 years	50–65 years
Total	64%	72%	57%	72%	72%	72%
Sweden	61%	67%	60%	66%	65%	66%
Norway	59%	59%	52%	68%	58%	61%
Denmark	60%	64%	54%	71%	65%	61%
Poland	68%	76%	55%	74%	77%	78%
Finland	61%	78%	66%	66%	68%	75%

Importance of recyclability (T2B) (%)	EUR 0–1,299	EUR 1,300–2,164	EUR 2,165–3,899	More than EUR 3,900
Total	71%	69%	66%	70%

Importance of recyclability (T2B) (%)	Secondary school education	Upper secondary school	University or equivalent
Total	55%	66%	72%

FACTS ABOUT RESPONDENTS

Here follows a summary of how the 5,064 respondents in the survey were distributed over different background variables.

Are you...?	Respondents	Share
Man	2,518	49.72%
Woman	2,529	49.94%
Other	17	0.34%

Age	Respondents	Share
18–29 years	1,212	23.93%
30–39 years	1,255	24.78%
40–49 years	1,083	21.39%
50–65 years	1,514	29.90%

Country	Respondents	Share
Sweden	1,011	19.96%
Norway	1,012	19.98%
Denmark	1,010	19.94%
Poland	1,015	20.04%
Finland	1,016	20.06%

What is your highest completed educational level?	Respondents	Share
Secondary school education	413	8.16%
Upper secondary school	2,249	44.41%
University or equivalent	2,347	46.35%
Don't know	55	1.09%

What is your personal monthly income before taxes?	Respondents	Share
EUR 0–1,299	1,124	22.20%
EUR 1,300–2,164	1,187	23.44%
EUR 2,165–3,899	1,523	30.08%
More than EUR 3,900	722	14.26%
Don't want to say/Don't know	508	10.03%


STENA
RECYCLING