NTI'S SUSTAINABILITY SURVEY 2024

About the survey

The survey was distributed to NTI newsletter subscribers from end of October 2024 to mid November 2024 as well as made accessible from NTI LinkedIn accounts.
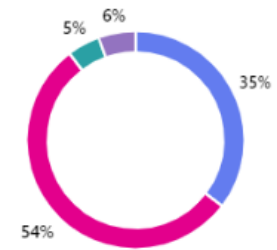The survey was anonymous.

A total of 656 responded during the survey period.

Survey results were analyzed and the key findings from the survey are shared in this report.

1. **Select which industry you work in**

● Industrial Design and Manufacturing	225
● Architect, Engineering, Construction and Owner	345
● Municipality and Infrastructure	31
● Other	35

6%
5%
35%
54%

2. **Select the size of your company**

● 1-10 employees	207
● 11-49 employees	147
● 50-249 employees	145
● 250 or more employees	154

24%
32%
22%
23%

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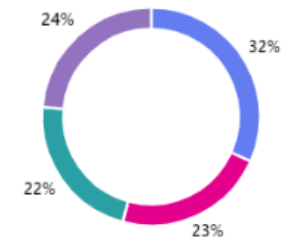
The questions we asked

- According to the European Commission, it's estimated that 80 % of all product-related environmental impacts are determined in the design phase. Are you taking this into account in your own design process?

- To what extent do you experience that your customers demand more sustainable projects and products from your company?

- To what extent is your company prepared to manage upcoming regulations and legislation from the EU and/or local government within sustainability, that may impact your business?

- What are the biggest sustainability challenges your organization faces in its current operations?

- NTI will host our online event: NTI Sustainability Summit on March 25, 2025 - launched for the second time across Europe. Is there a specific topic you would like us to address at this event?

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Key Insights

1. Demand

The demand for sustainable products is growing rapidly, reshaping industries across Europe and placing new expectations on businesses. NTI's 2024 Sustainability Survey highlights that larger companies experience significantly more pressure to deliver sustainable solutions, while smaller businesses often find themselves unprepared to meet upcoming EU regulations.

2. Process and Readiness

Despite the European Commission's estimate that 80% of a product's environmental impact is determined during the design phase, over half of AEC (Architecture, Engineering, and Construction) companies fail to consider sustainability at this critical stage. This oversight leaves many businesses vulnerable to stricter regulatory requirements and customer demands.

3. Challenge

Key challenges such as the high costs of sustainable materials and technologies, a lack of expertise in sustainable practices, and difficulties balancing sustainability with profitability continue to hinder progress. Strikingly, less than 1 in 10 manufacturing companies feel adequately prepared to manage these challenges, while companies that prioritize sustainability in their design processes are far better equipped for the future.

Demand

Demand for more sustainable products
Twice as big in the Nordics

49%
Nordics

25%
Rest of Europe

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Demand

Demand for more sustainable products
is the same in AEC & MFG industries

35%
AEC

36%
MFG

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Demand

Larger companies experience bigger demand for sustainable products/projects

45%
of larger companies* experience higher demand

27%
of smaller companies* experience higher demand

*Smaller companies are defined as companies with below 50 employees and larger defined as above 50 employees.

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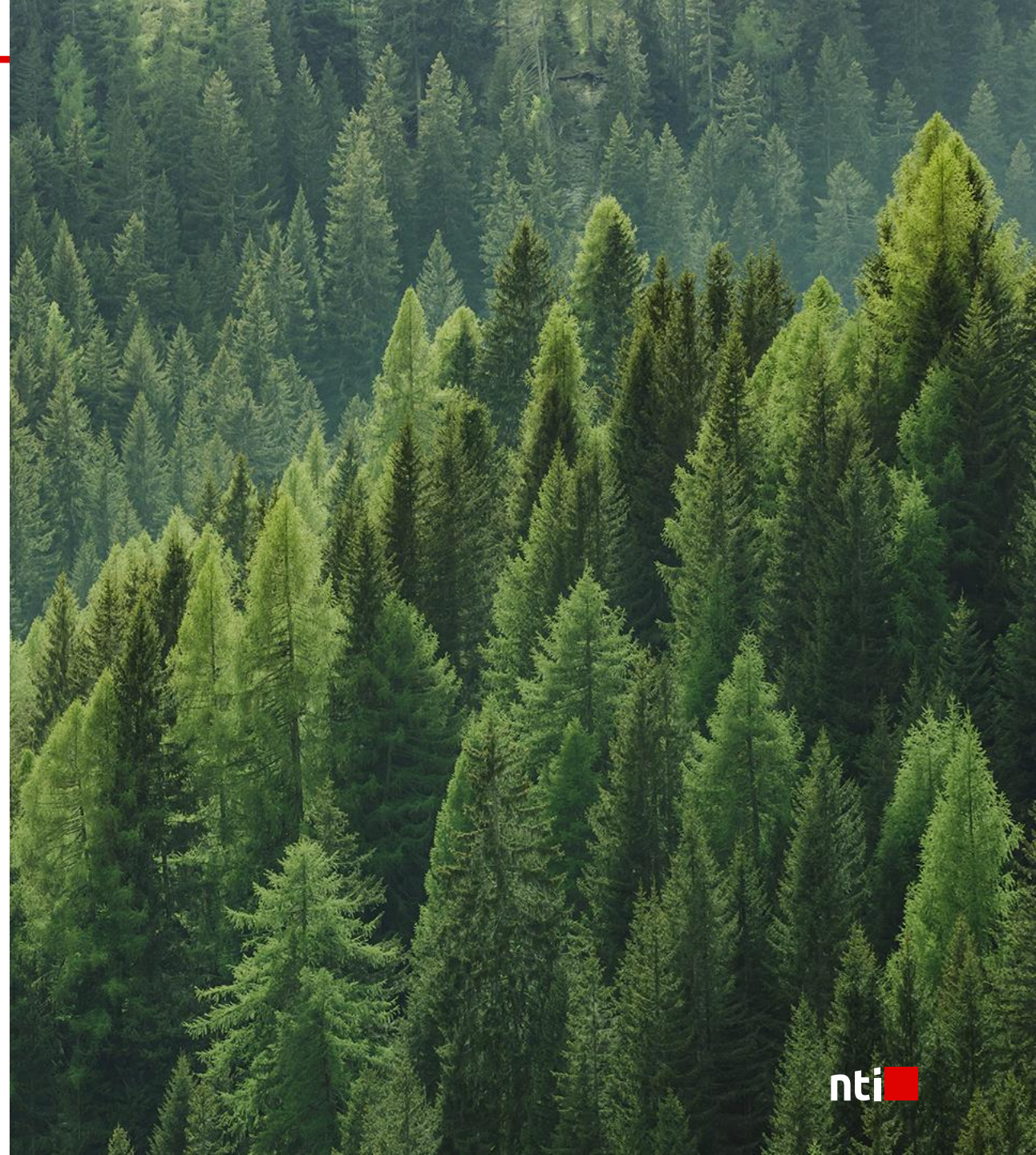# Readiness

Small businesses not as prepared

38%

of small businesses* are unprepared to manage upcoming regulations and legislation from EU within Sustainability

22%

of bigger businesses* are unprepared to manage upcoming regulations and legislation from EU within Sustainability

*Small businesses defined as companies with below 50 employees and bigger defined as above 50 employees.

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Process

Over half

of European AEC companies do not consider sustainability in the design phase, although 80% of the environmental impact for the product is decided there.

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Process

Companies considering sustainability in the design phase is significantly better prepared to manage upcoming regulations and legislation within sustainability

64%
of companies considering sustainability in the design phase that are prepared

27%
of companies not considering sustainability in the design phase that are prepared

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Challenge

30% **of European AEC and MFG companies** have a hard time balancing sustainability with profitability and cost control

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Challenge

30% of European AEC and MFG companies lack sufficient expertise or knowledge on sustainable practices

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