

Summary: consolidated surveys results

Introduction

The Concrete Sustainability Council (CSC) is the global certification system for responsibly sourced ready-mixed and precast concrete. Our members are dedicated to advancing and showcasing concrete as a sustainable construction material, thereby facilitating informed decision-making within the industry. Via a rigorous, transparent, and evolving voluntary certification process, CSC empowers organizations to assess their sustainability metrics, drive continuous improvement, and receive acknowledgment for their achievements.

This document presents the findings and essential insights gathered from two global surveys conducted across all regions where CSC has a presence in the market. These regional results were consolidated by the CSC Management Team, facilitated by the CSC Secretariat.

Background

On the occasion of its 10th anniversary, the Concrete Sustainability Council (CSC) launched two global surveys designed to strengthen community engagement and support the ongoing development of CSC certification.

These studies aim to gather feedback from stakeholders across the entire value chain—including producers, certification bodies, partners, and end-users—regarding their experience with the CSC, market expectations, and future priorities.

Customer and market surveys are essential tools for understanding stakeholder needs, identifying areas for improvement, and guiding strategic development. They help capture feedback, assess value, and uncover opportunities to enhance impact across different regions.

All members of the CSC community were invited to participate. CSC Regional System Operators (RSOs) sent an invitation with a link to the survey to all certificate holders and stakeholders. Taking approximately five minutes to complete, these online questionnaires were open from May 11 to June 7, 2026. Response rate was 12%.

The survey was conducted on a voluntary basis, with all data received by CSC remaining anonymized unless respondents explicitly consented to waive anonymity by providing contact details for follow-up. To ensure confidentiality, access to individual responses was restricted solely to CSC survey administrators.

Scope

Market Survey

The Market survey was intended for non-building materials producers, such as Green Building Labels, infrastructure labels, sustainability schemes, Certification bodies, Contractors, architects, and Governmental bodies.

A total of 59 responses were submitted.

Customer Survey

The Customer survey targeted not only certified companies, but all producers of Concrete, cement, and aggregates.

A total of 121 responses were collected.

Intended Outcome

Input received will directly support the next phase of CSC's development and help reinforce our shared ambition to advance sustainability across the concrete supply chain.

Overall Conclusion

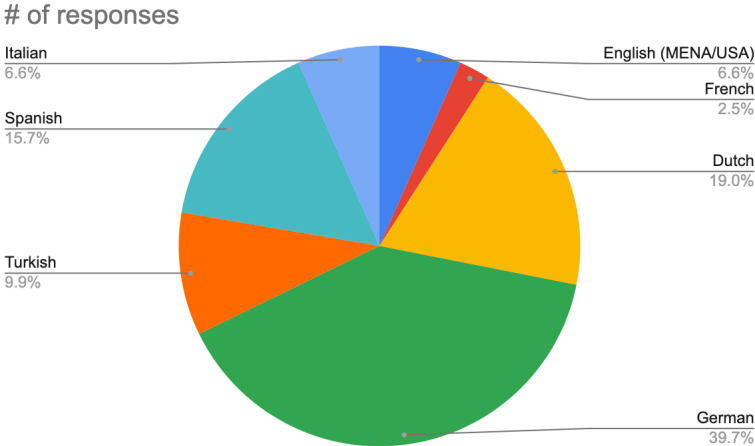
The survey results indicate that CSC is viewed positively by organizations already engaged with the certification scheme, but broader market awareness and perceived commercial value remain significant barriers to wider adoption.

Among existing users, CSC is primarily valued as a mechanism to demonstrate sustainability credentials, strengthen corporate reputation, improve transparency, and respond to stakeholder expectations. However, among non-certified organizations and external market stakeholders, awareness is uneven and the business case for certification is not yet universally understood.

The findings suggest that CSC's next phase of growth will depend less on technical certification improvements and more on increasing market recognition, regulatory alignment, procurement relevance, and demonstrable commercial benefits.

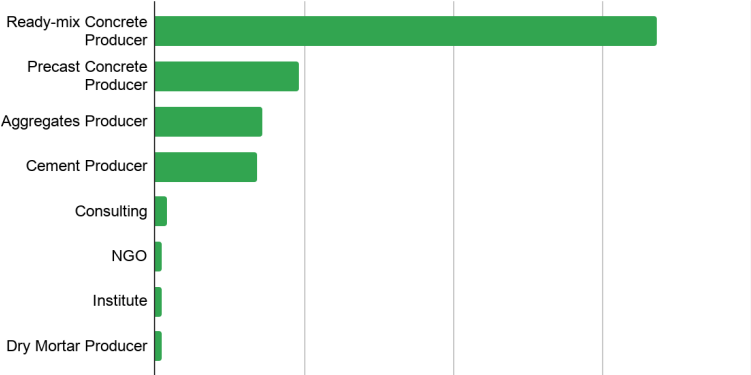
Key Findings from Customer Survey:

Survey responses were received from a diverse range of language groups, with German-speaking respondents representing the largest share (39.7%) of participants. Dutch (19.0%) and Spanish (15.7%) speakers also contributed significantly, while Turkish respondents accounted for 9.9% of responses. Italian and English (MENA/USA) respondents each represented 6.6% of the total, and French respondents made up 2.5%. Overall, the results provide valuable perspectives from across different communities represented in the survey.



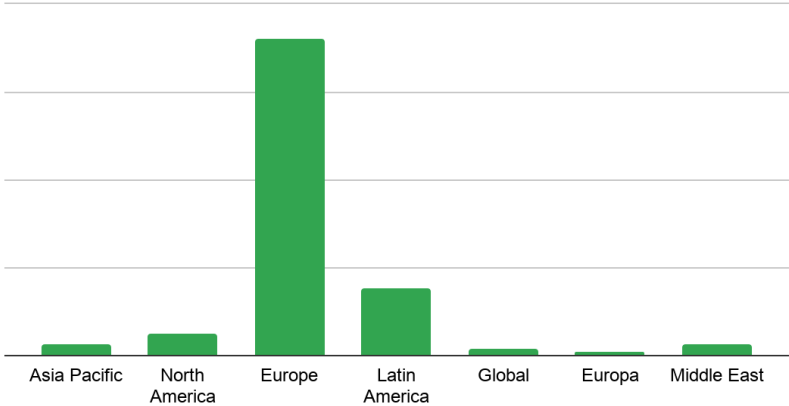
The survey responses were predominantly provided by organizations operating in the ready-mix concrete sector, which represented by far the largest respondent group. Precast concrete companies formed the second-largest segment, while cement producers and aggregate suppliers accounted for smaller but notable proportions of participants. A limited number of responses were also received from aggregate producers, consulting organizations, institutes, NGOs and dry mortar producers. Overall, the results indicate that the survey findings are most strongly influenced by perspectives from the ready-mix concrete industry, while still incorporating insights from a broader range of stakeholders across the construction materials value chain.

2. Which of the following best describes your organization?



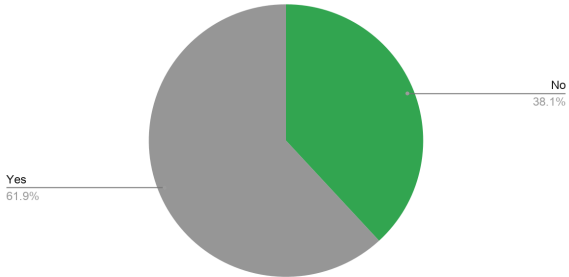
Survey respondents were predominantly based in Europe, which accounted for the vast majority of responses. Latin America represented the second-largest regional group, although at a considerably lower level than Europe. Smaller numbers of responses were received from North America, Asia Pacific, the Middle East, and organizations with a global operating footprint. Overall, the survey results are strongly reflective of the European market while also incorporating perspectives from other regions, providing a broader international context for the findings.

3) In which region(s) do you primarily operate?

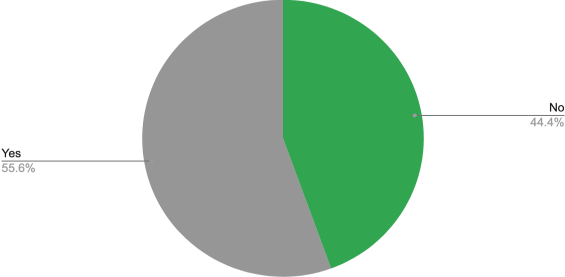


The survey results indicate that a majority of respondents have practical experience with CSC certification and CSC re-certification processes. Nearly two-thirds of participants (61.9%) reported having certified one or more ready-mix concrete, precast concrete, aggregates, or cement plants, demonstrating a strong level of engagement with certification schemes across the respondent group. In addition, more than half of respondents (55.6%) indicated that they had already completed at least one re-certification cycle following the expiration of a previous certificate. At the same time, a substantial proportion of respondents have not yet certified plants (38.1%) or undergone re-certification (44.4%), highlighting the presence of organizations at different stages of their certification journey. Overall, the findings reflect a balanced mix of experienced certificate holders and organizations with more limited exposure to certification and re-certification processes, providing a broad range of perspectives within the survey.

4) Have you already certified plants (ready-mix, precast, aggregates or cement plants) with the Concrete Sustainability Council?



4.2) Have you re-certified your plants at least once after your certificates expired?

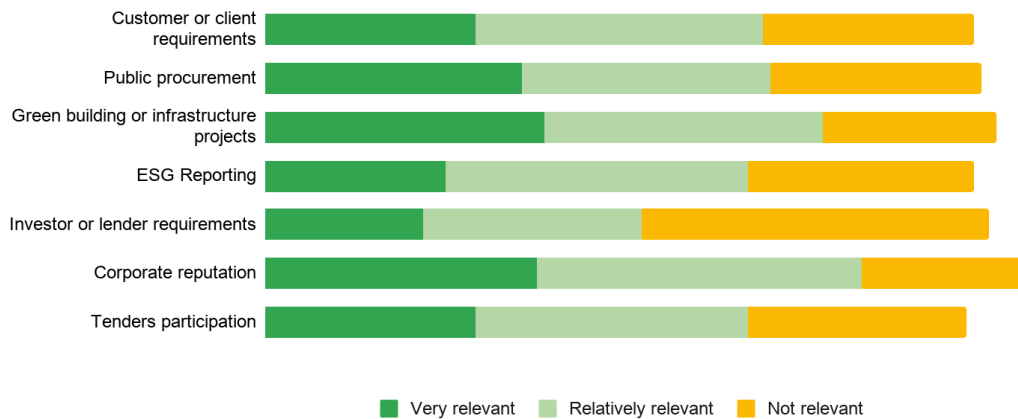


Existing certified organizations generally perceive value in CSC

The strongest motivations for certification are:

- Enhancing corporate reputation and image
- Increasing recognition of green public procurement
- Meeting Green Building or Infrastructure projects requirements
- Supporting participation in tenders and procurement processes (client requirement)

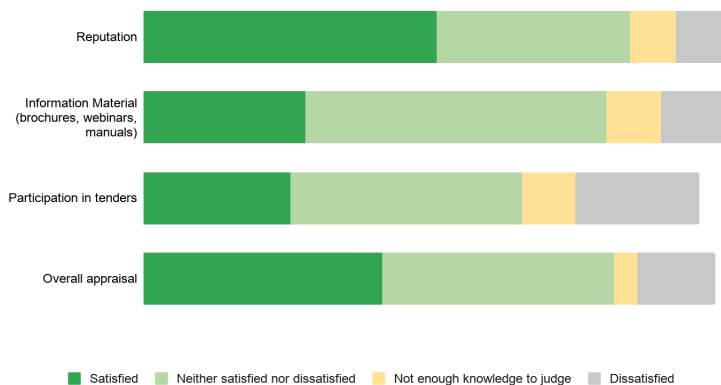
9) Strongest motivations for certification



Satisfaction levels are generally positive

Across the satisfaction-related questions, positive responses consistently exceed negative responses, with many respondents reporting satisfaction with reputation benefits. However, a significant share of respondents remains neutral, suggesting opportunities to strengthen perceived value and differentiation.

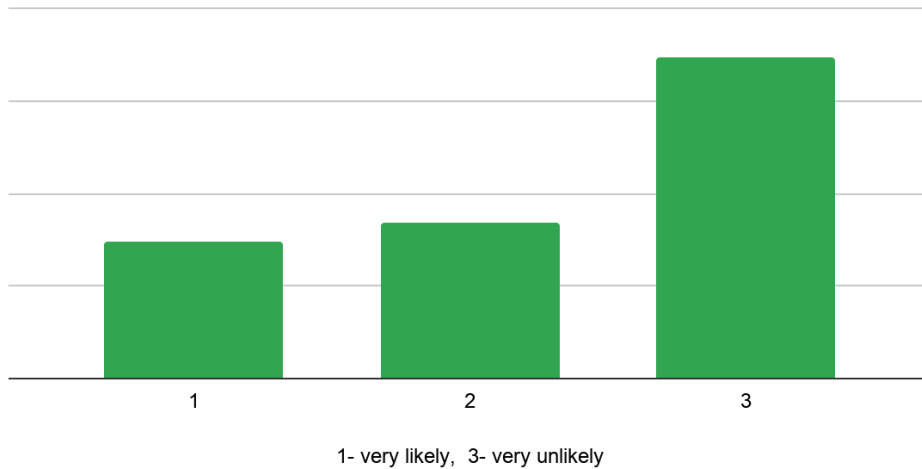
6) Are you satisfied with the benefits that The Concrete Sustainability Council provides?



Future adoption potential exists

There is a meaningful pool of organizations likely to consider certification in the coming years if recognition and perceived value continue to increase.

10) How likely is your organization to consider CSC certification in the next 2–3 years?



Main Barriers to Adoption

The non-certified segment identified several recurring obstacles:

1. Cost concerns

Certification costs remain a meaningful barrier, particularly for organizations that do not yet perceive a direct commercial return.

2. Unclear business value

Many respondents are unconvinced that certification generates sufficient commercial benefit, customer preference, or competitive advantage.

3. Administrative burden

Organizations perceive certification as requiring significant resources and administrative effort.

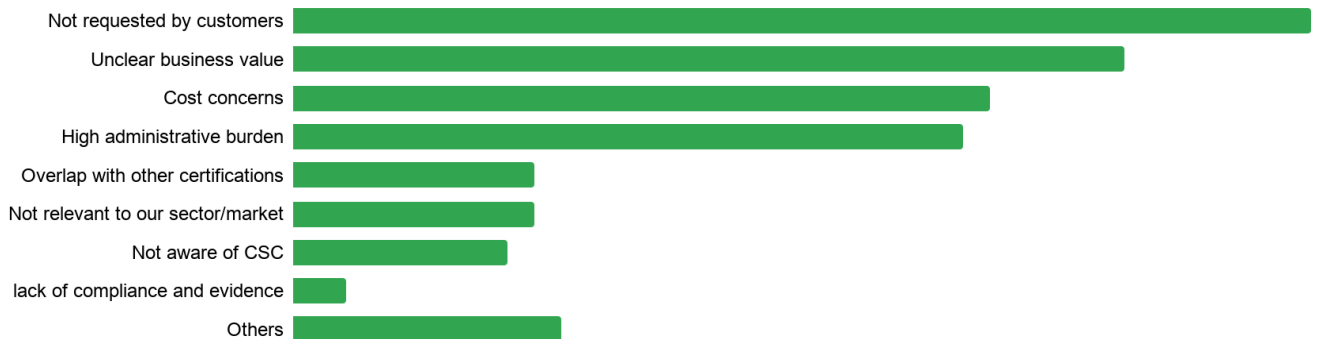
4. Limited customer demand

A recurring theme is that customers are not actively requesting CSC certification, reducing the urgency to adopt it.

5. Awareness gap

Some respondents remain unfamiliar with CSC altogether.

7) Main Barriers to Adoption



According to the most recent version of the Technical Manual available on www.csc.eco, stakeholder consensus can be summarized as follows:

The criteria identified as having the most prominent and extensive explanation requirements (surpassing or reaching ~60% relevance) are:

B3 Innovation

E3 Energy & Climate

M2 Environmental

E7 Secondary

E1 Lifecycle Impact

These categories clearly demand the most robust, deeply detailed narratives.

Conversely, certain criteria are overwhelmingly marked as "not relevant" for extensive explanation, indicating highly standardized or straightforward requirements:

E2 Land Use

E4 Air Quality

B1 Local Economy

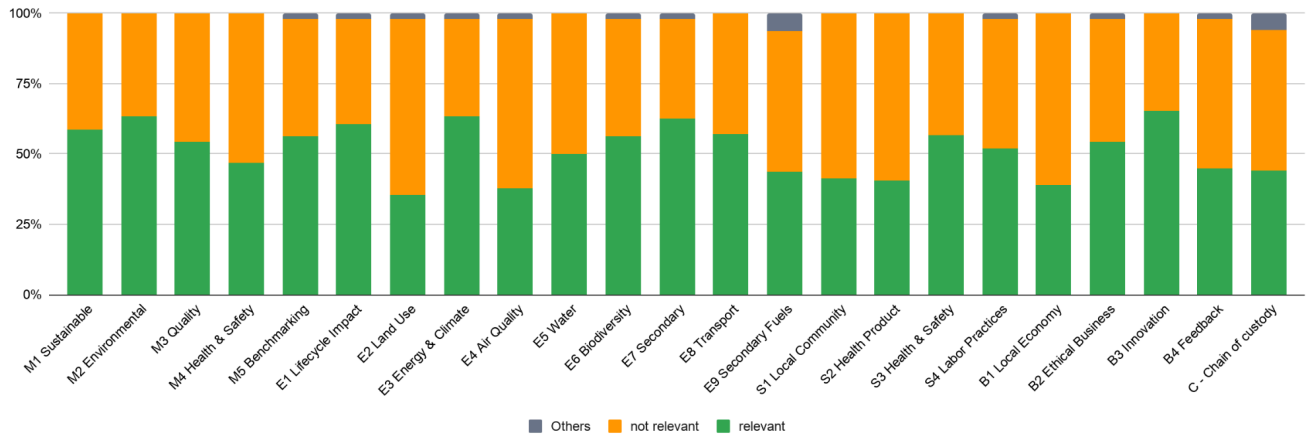
S2 Health Product

S1 Local Community

These criteria can be largely streamlined, given their low perceived requirement for extensive standalone explanations.

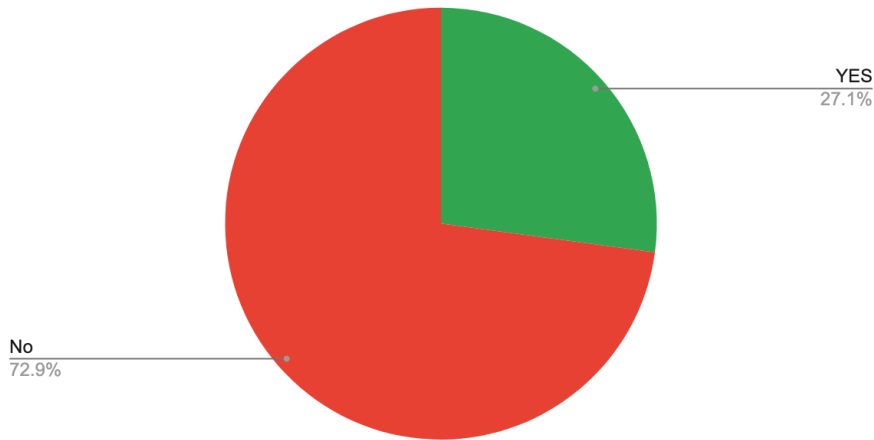
Criteria such as E9 Secondary Fuels and C - Chain of custody indicate unique edge cases that require some explanation.

5.1) According to the most recent version of the Technical Manual available on www.csc.eco, which criteria particularly have extensive explanation requirements?



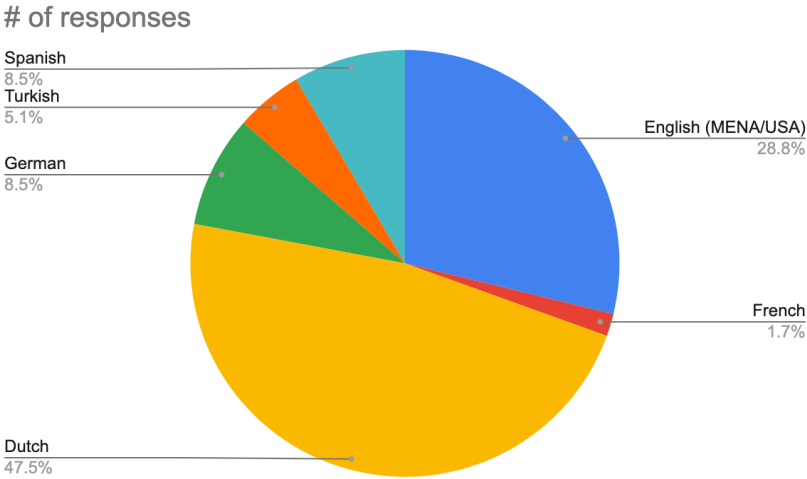
Although most participants preferred to limit their involvement to the survey itself, more than one-quarter of respondents offered the opportunity for additional dialogue. This provides a valuable pool of participants who may be willing to share further insights, clarify survey findings, or contribute to future discussions on the topic.

Would you be open to a follow up discussion ?



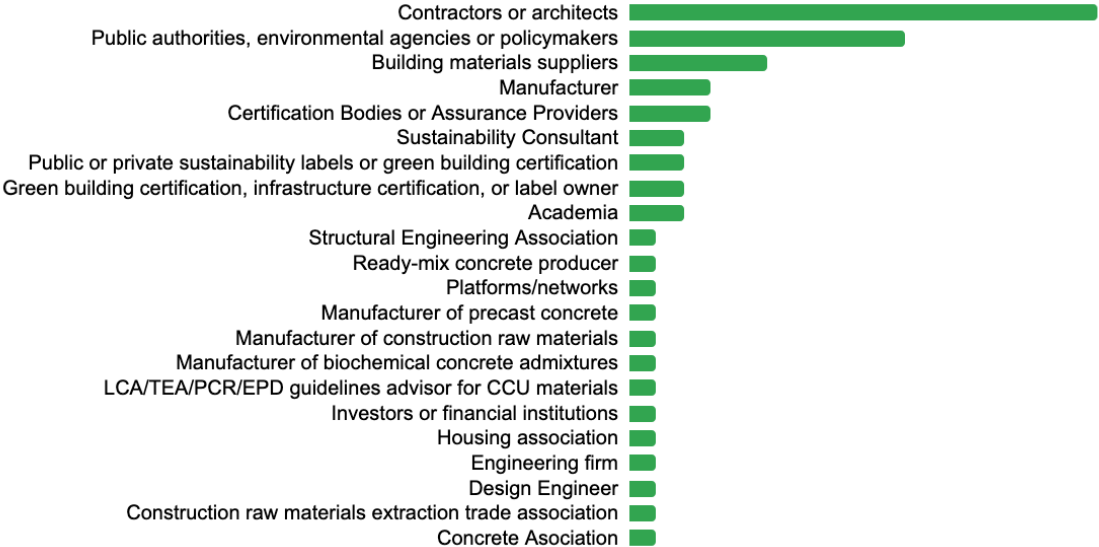
Key Findings from Market Survey:

Responses were received primarily from Dutch-speaking participants, who accounted for nearly half of all responses (47.5%). English-speaking respondents from the MENA and USA regions represented the second-largest group (28.8%), while German and Spanish speakers each contributed 8.5% of responses. Turkish respondents accounted for 5.1%, and French speakers represented a smaller share at 1.7%. Overall, the results reflect strong engagement from Dutch- and English-speaking stakeholders, while also incorporating perspectives from a diverse range of language groups.



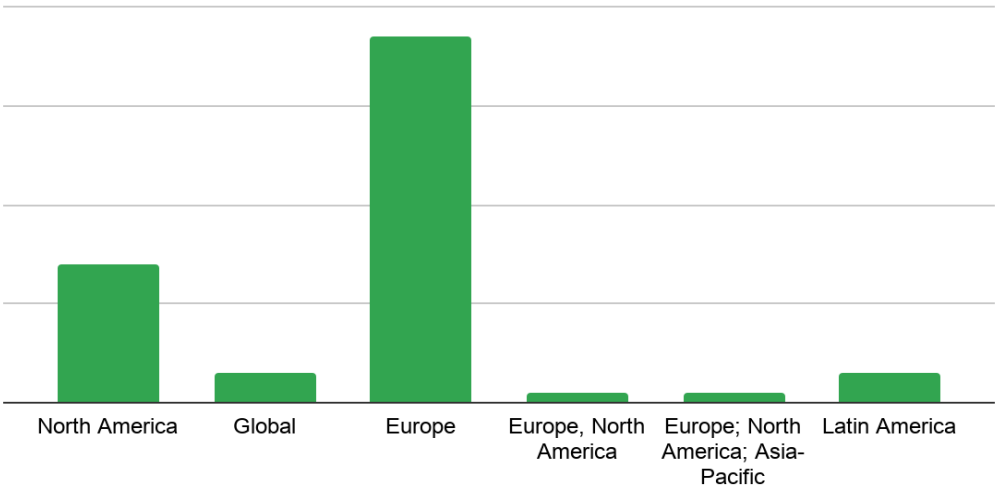
Survey responses were received from a broad range of organizations across the construction and building materials value chain. Contractors represented the largest respondent group by a significant margin, highlighting their strong engagement with the survey. Design engineers and government organizations also contributed notable numbers of responses, while smaller groups included representatives from building materials companies, LCA/EPD practitioners, certification bodies, academia, housing associations, construction firms, and consultancy organizations. Overall, the results reflect a diverse stakeholder base, with particularly strong representation from contractors and other organizations directly involved in the design, construction, and assessment of buildings and infrastructure.

2) Which of the following best describes your organization?



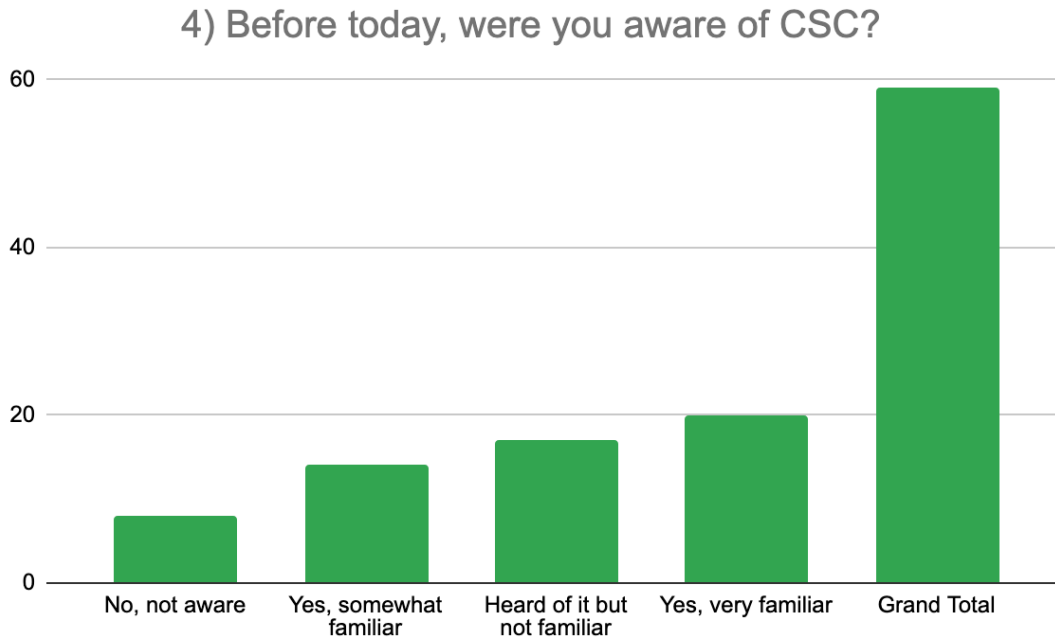
Responses were received across multiple regions, demonstrating global applicability and recognition, with the majority of responses originating from Europe. North America represents the second-largest respondents segment, but remaining significantly smaller than Europe. Latin America and Global responses maintain a small but noticeable presence.

3) In which region(s) do you primarily operate?



Awareness remains a challenge

While many market participants reported being familiar with CSC, a substantial proportion either have only limited awareness, or have heard of CSC but do not understand it well.



This suggests CSC has established a presence in the market but has not yet achieved broad recognition.

Brand Awareness Channels

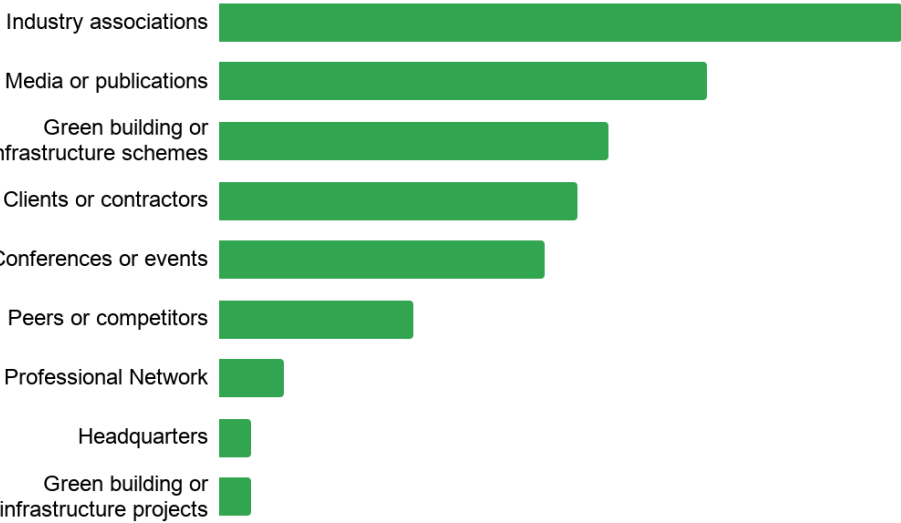
Industry networks stand out as the single most effective channel for brand awareness, capturing the highest volume of responses.

Media represents the second-most prominent touchpoint, indicating a solid return on public relations, digital media, or publication initiatives.

Green building and Clients hold robust middle-tier positions, demonstrating that active commercial relationships and sector-specific alignments are highly functional acquisition funnels.

Conferences or events and Peers or competitors show moderate traction, indicating steady organic professional networking, though less impactful than macro industry channels.

5) If you were aware of CSC, where did you hear about us?

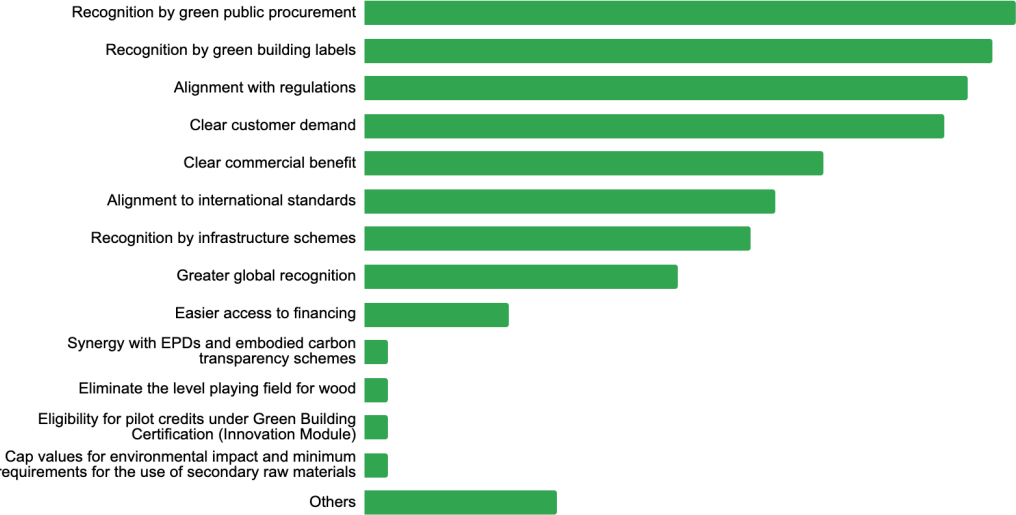


External stakeholders want stronger market relevance

The most frequently cited factors that would increase interest in CSC include:

1. Recognition in public procurement
2. Recognition by green building labels
3. Alignment with regulations
4. Clear customer demand

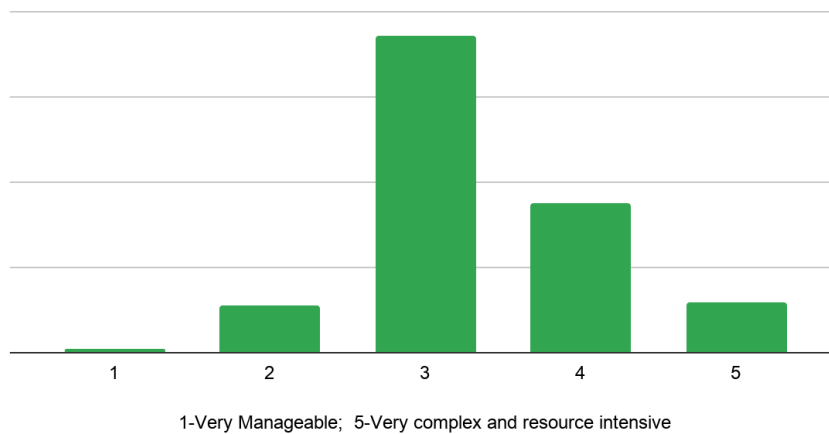
8) If applicable, what would most increase your interest in The Concrete Sustainability Council (CSC) certification?



Certification Complexity Perception

The certification process is perceived as moderate, requiring middle effort. Almost no stakeholders perceive the current process as entirely effortless or friction-free. There is an opportunity to simplify compliance workflows.

9) How do you perceive the complexity of CSC certification processes in general?

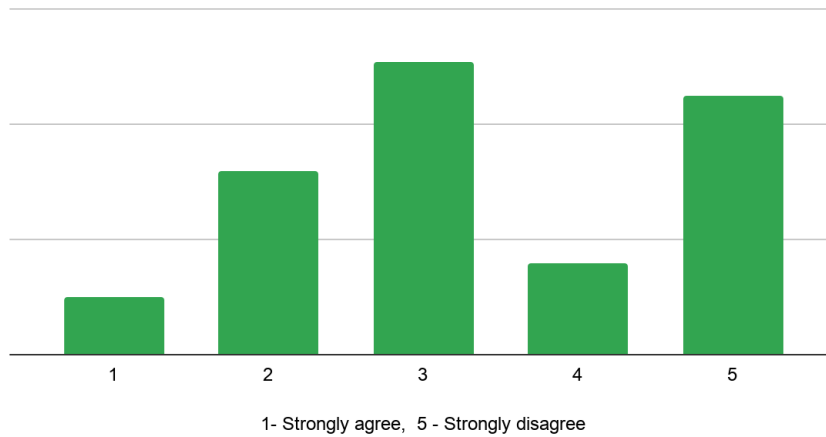


The market appears less concerned with certification mechanics and more concerned with whether CSC influences purchasing decisions, procurement requirements, project eligibility, and sustainability ratings.

Sustainability is no longer the differentiator

The findings support promoting CSC not merely as a certification system that helps position concrete as a more sustainable building material, but as a market-enabling sustainability standard, an enabler of low-carbon, transparent, and responsible sourcing supply chains. Respondents broadly accept sustainability as an important industry requirement. The strategic question is no longer whether sustainability matters. The strategic question is whether CSC influences commercial decisions.

7) Do you believe CSC Certification helps position concrete as a more sustainable building material?



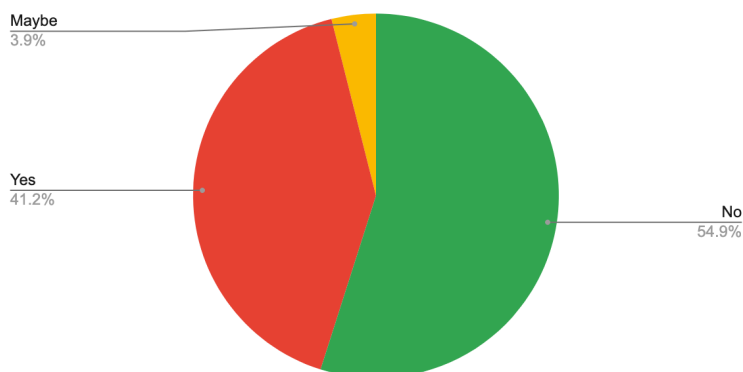
The strongest lever for future adoption appears to be increased recognition

Respondents consistently indicate that certification becomes more valuable when it is:

- Recognized by green building schemes
- Referenced in procurement frameworks
- Aligned with sustainability regulations
- Accepted by infrastructure certification systems
- Linked to customer and investor requirements

Much like the customer survey outcomes, while the majority of participants chose to confine their engagement to the survey alone, nearly half expressed willingness to engage in further dialogue, which will support the ongoing development of the CSC certification system.

Would you be open to a follow up discussion ?



Recommendations

Below, we have included some examples of some recommendations and feedback given by responders. Feedback was given in the respondent's preferred language and translated into English.

General:

- 1) Impact assessment as long-term proof that certification is actually benefiting the industry
- 2) Address the perception of high cost by enhancing market awareness and clearly demonstrating the CSC's long-term cost-benefit ratio and distinct added value.
- 3) While training is currently provided, there is room to focus sessions on materials specific to the local context and to secure greater support from academia.
- 4) Training on digital infrastructure integration should be provided to stakeholders, and innovative ideas should be discussed through integration meetings
- 5) Get the Federal State, City County, Local governments all on the SAME page! Better awareness!
- 6) Stronger recognition from infrastructure owners and promoters!
- 7) Strengthen value chain education
- 8) Pursue recognition in Green Public Procurement
- 9) Standardize CO2 Certification for Precast Components. CSC should serve as the unifying, industry-wide framework for these benchmarks.
- 10) Revise product sustainability metric frameworks, as the CSC rating system heavily weights specific "cement-component" criteria, which inadvertently penalizes low-carbon or cement-free innovations.

Technical Manual, Toolbox and Helpdesk:

- 11) Accept and incorporate other steel certification systems commonly used in the regions/countries.
- 12) Move beyond documenting the current status; support supply chains and businesses in setting 2050 Net Zero targets and score them against these goals.
- 13) Provide greater support for the local circular economy; specifically, offer technical training on recycling waste materials obtained from buildings demolished during urban transformation processes.
- 14) Expand the acceptance criteria to allow emerging/medium/small countries to be able to certify plants
- 15) Adjust the 3-year LTI review window to account for varying facility capacities to ensure equitable safety evaluations.
- 16) Improve user experience implementing FAQs.
- 17) Enhance Toolbox usability and efficiency by migrating from a centralized bulk-evidence upload system to a direct, question-by-question attachment model.

What are the next steps? CSC Enhancement Strategy

In response to the findings, CSC will implement several strategic improvements, such as:

- Creating a dedicated 'communication toolkit' for first-time certificate holders.
- Development of a pricing model tailored to small enterprises to enhance immediate commercial profitability.
- Growth strategies will focus on turning North America into a more balanced pillar relative to Europe.
- Sustaining efforts to highlight the importance of sustainable practices and traceability, emphasizing the supportive role of CoC Certification.
- Designing new and updated training programs for both auditors and new members.
- Further optimizing the Toolbox platform to streamline the certification process.
- Prioritize partnership efforts to major industry associations and sector-wide initiatives.
- Strengthen integration with green building and infrastructure sustainability schemes.

The Concrete Sustainability Council (CSC) extends its sincere gratitude to certificate holders, Regional System Operators (RSOs) and stakeholders community for their invaluable contributions to these surveys. Your insights are essential in shaping the evolution of the CSC certification system.

CSC deeply appreciates the feedback provided, which will be instrumental in guiding future progress, driving continuous improvement, and advancing sustainable practices across the global concrete value chain.