

CIRCULAR  
REALITY  
SCAN



# Key data and insights Circular Reality Scan 2026



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The Circular Reality Scan 2026 is a representative study among 1,000 Dutch & 1,000 Belgian consumers (aged 18–70) and 200 Dutch & 200 Belgian companies (with  $\geq 10$  employees).

The research was conducted by the research agency Ipsos on behalf of Renewi.

With this scan, Renewi maps trends in knowledge, attitudes and behaviour regarding recycling and circularity. The study provides an up-to-date and representative picture of the extent to which intentions align with actual behaviour in Belgium and the Netherlands.

The results of the first Circular Reality Scan are being made public in connection with Global Recycling Day (18 March 2026).

# About the research



# The gap between ambition and behaviour in circularity

Consumers and businesses across Belgium and the Netherlands like to see themselves as frontrunners in recycling and circularity. We sort our waste, make conscious choices and believe we are doing better every year. But does that self-image match reality?

The Circular Reality Scan 2026 is a large-scale Ipsos study among consumers and companies in Belgium and the Netherlands. For the first time, it combines both perspectives and reveals where ambitions, expectations and actual behaviour diverge – and how this gap is slowing down the circular transition.

The result is a clear and sometimes confronting reality check: people and companies strongly believe in recycling and circularity, but act far less consistently in practice.



# 1. We overestimate our recycling behaviour: consumers and businesses alike

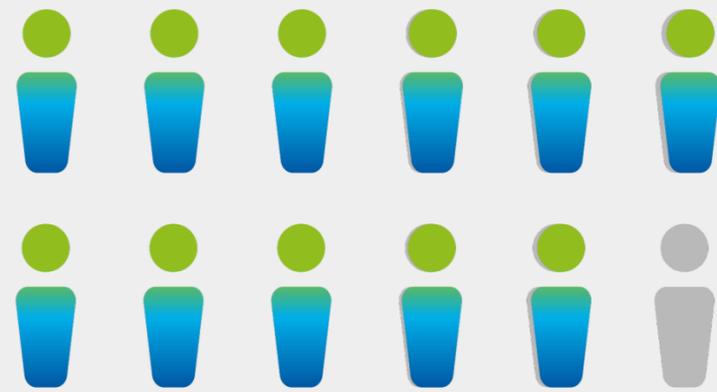
People and organisations attach great importance to recycling. Yet only a minority act consistently, and purchasing decisions often undermine good intentions.

Recycling is deeply rooted in public awareness. Both households and companies say they take responsibility. But when intentions are compared with real behaviour, a structural gap emerges.



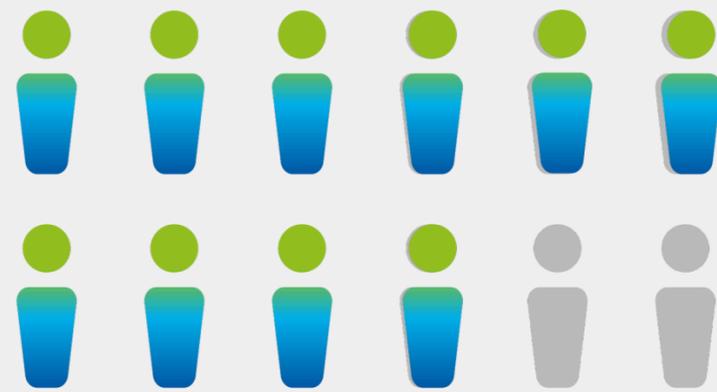
# Numbers

The Netherlands



**9 out of 10**

consumers consider recycling important

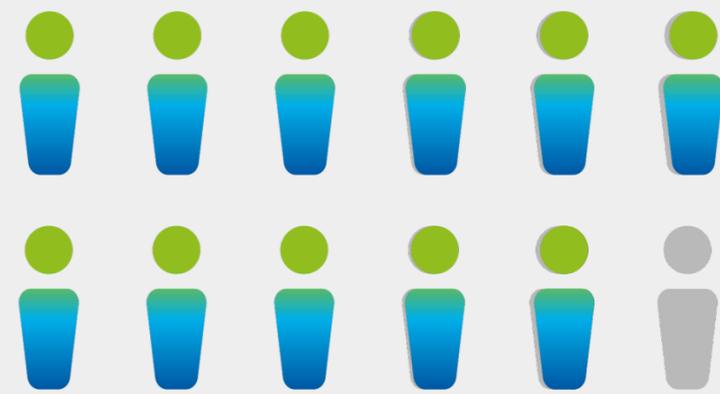


**8 out of 10**

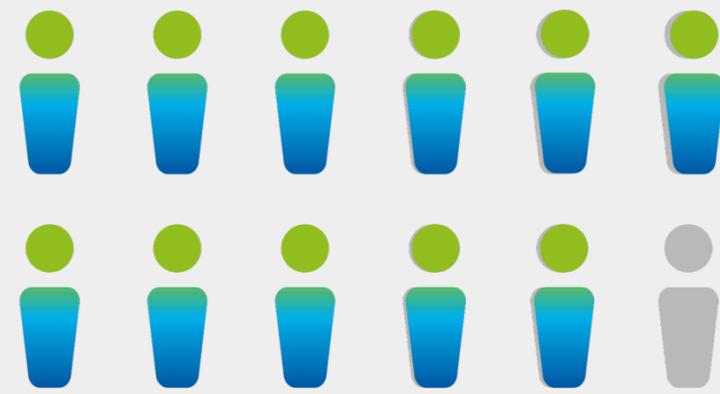
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# Numbers

Belgium



**9 out of 10**  
consumers consider  
recycling important



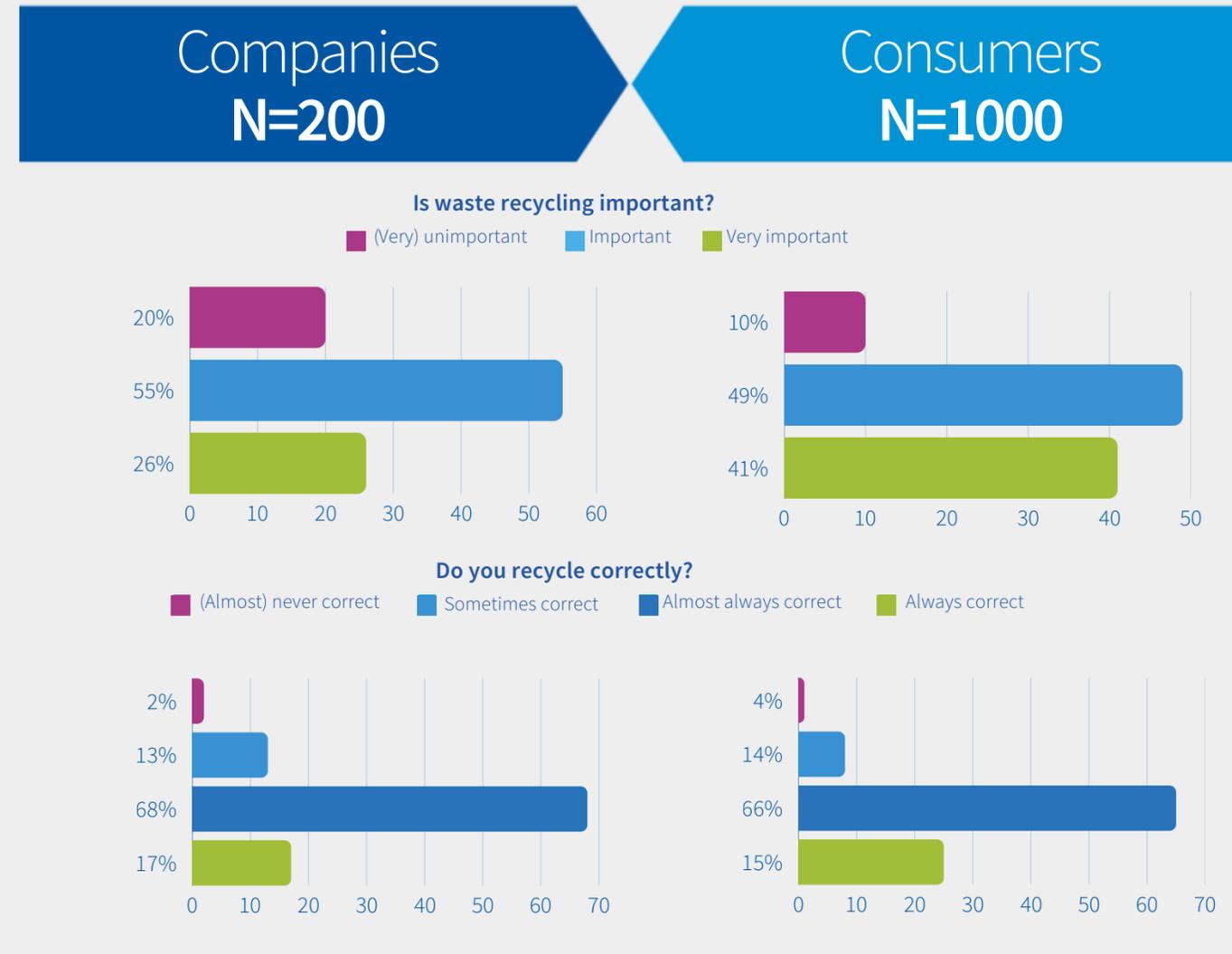
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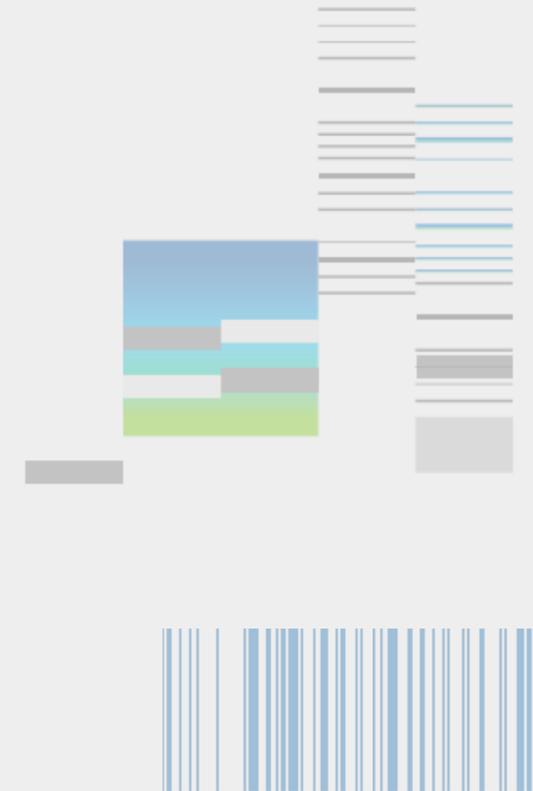
## The Netherlands

### Attitude on recycling

1 in 5 Dutch companies do not find waste recycling important, in contrast to 1 in 10 of the consumers. Both companies and consumers claim they mostly recycle correctly.



**Age difference**  
 The older generation is also more convinced they sort waste correctly (37% always in 55-70) versus the younger generation (10% always in 18-24).



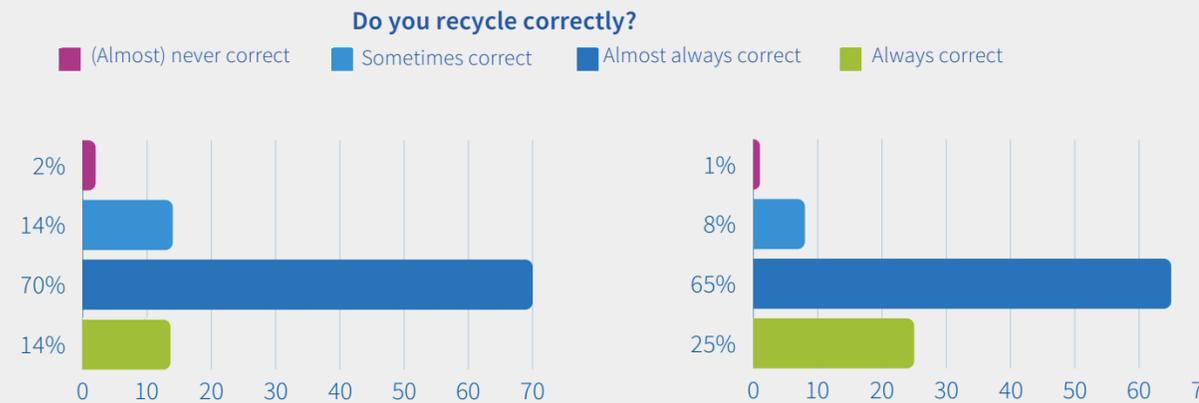
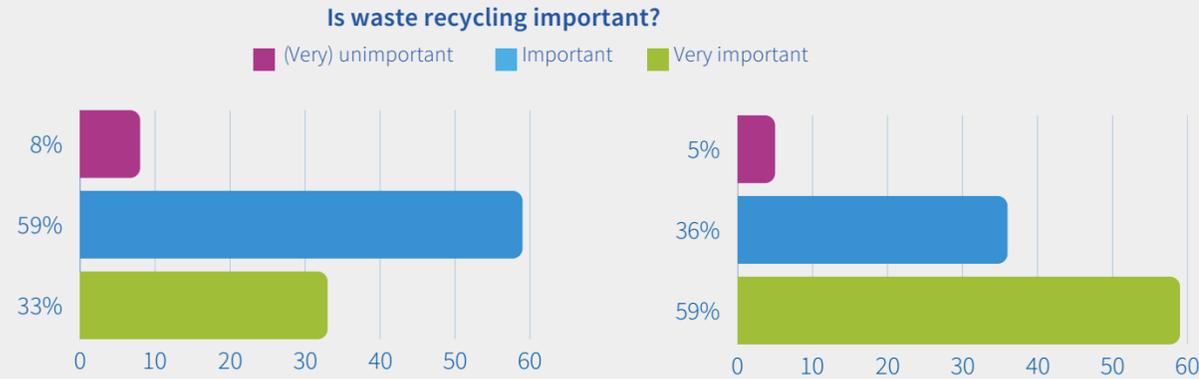
Base: Country: Belgium companies (n=200) / Country: Belgium Consumers (n=1000)  
 Question: RCI. How important is waste recycling for your organization / RCYI. How important do you find it to sort waste correctly for recycling  
 RCC. To what extent do you think waste is correctly recycled in your company / RCYC. To what extent do you think you sort correctly

# Numbers

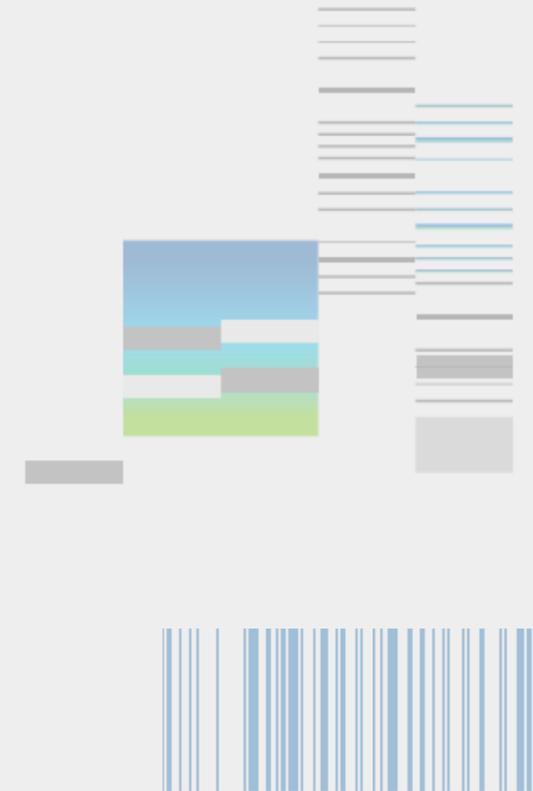
Belgium

## Attitude on recycling

1 in 12 in Belgian companies do not find waste recycling important, in contrast to 1 in 20 of the consumers. Both companies and consumers perceive that they (almost) always recycle correctly.



**Age difference**  
 The older generation is also more convinced they sort waste correctly (37% always in 55-70) versus the younger generation (10% always in 18-24).



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## 2. The green image of younger generations does not always hold up

Gen Z is often seen as environmentally conscious, but the data shows less consistent behaviour in practice.



# Numbers

## The Netherlands

- Older consumers attach more importance to recycling:
  - 55–70 years: **51%** say it is very important
  - 18–24 years: **29%**
- Recycled materials matter less to young adults:
  - 18–24 years: **59%**
  - 55–70 years: **74%**
- Less consistent sorting:
  - **13%** of young people always sort correctly
  - **23%** among older consumers



# Numbers

Belgium

- Recycled materials matter less to younger consumers:
  - 18–24 years: **75%** consider it important
  - 55–70 years: **88%**
- Sorting behaviour is weaker:
  - Only **10%** of young people always sort correctly
  - **37%** among 55–70 year-olds
- **26%** of young people rarely or never go to the recycling park



# 3. Where obligations exist, behaviour follows. That's exactly why SMEs lag behind.

Smaller companies want to move forward, but often lack capacity, data and mandate. Larger companies benefit from regulation and reporting obligations.

Circular behaviour shifts from intention to action when frameworks are clear, mandatory and enforceable.

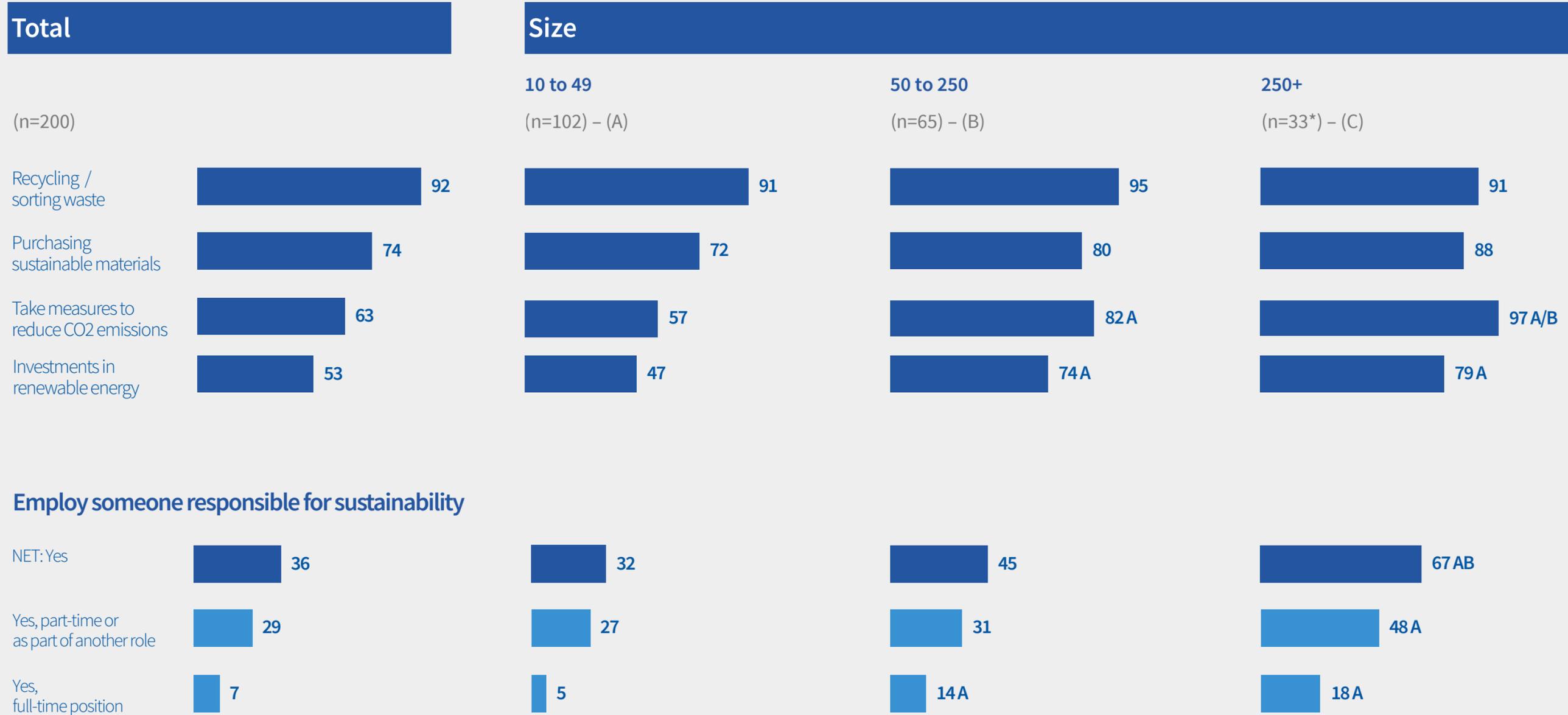




# Numbers

## The Netherlands

### Sustainability measures Companies



Base: Country: Netherlands companies (n=200)  
 Question: grid\_STATM:STATM\_1. Does your organization do the following? Take measures to reduce CO2 emissions | CFUL. Does your company employ someone responsible for sustainability

\* ! small sample - indicative results

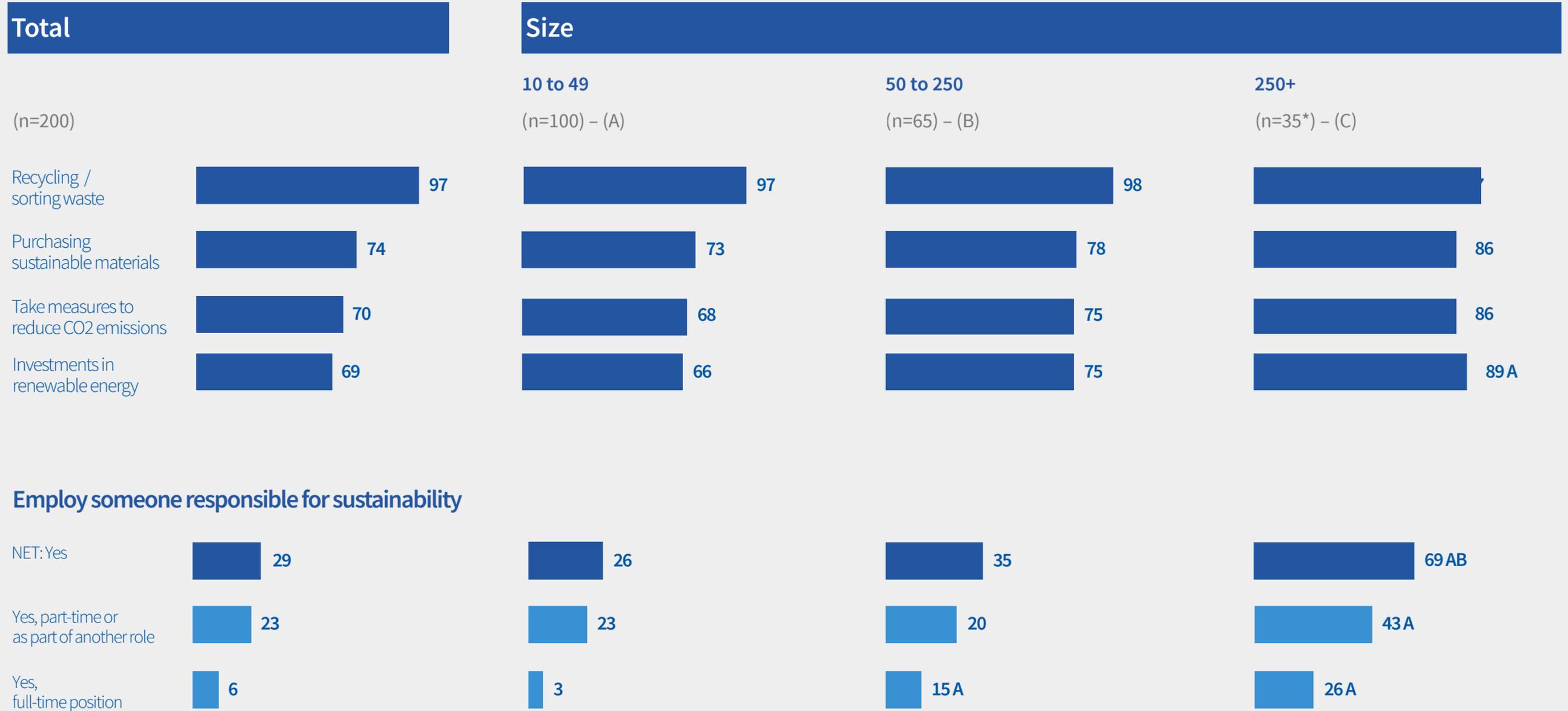


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# 4. The knowledge gap slows down progress

Lack of insight directly affects behaviour, trust and purchasing decisions.

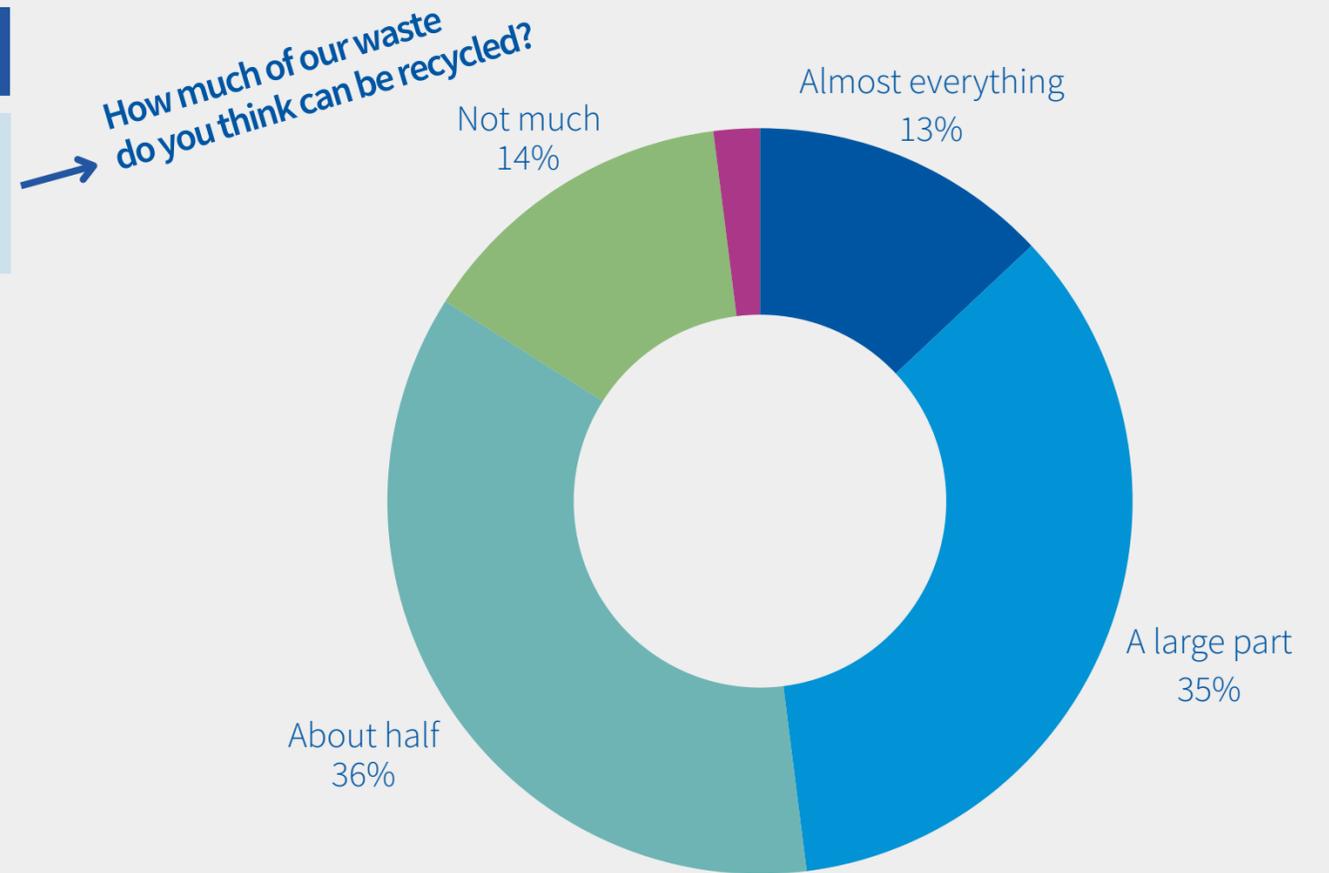
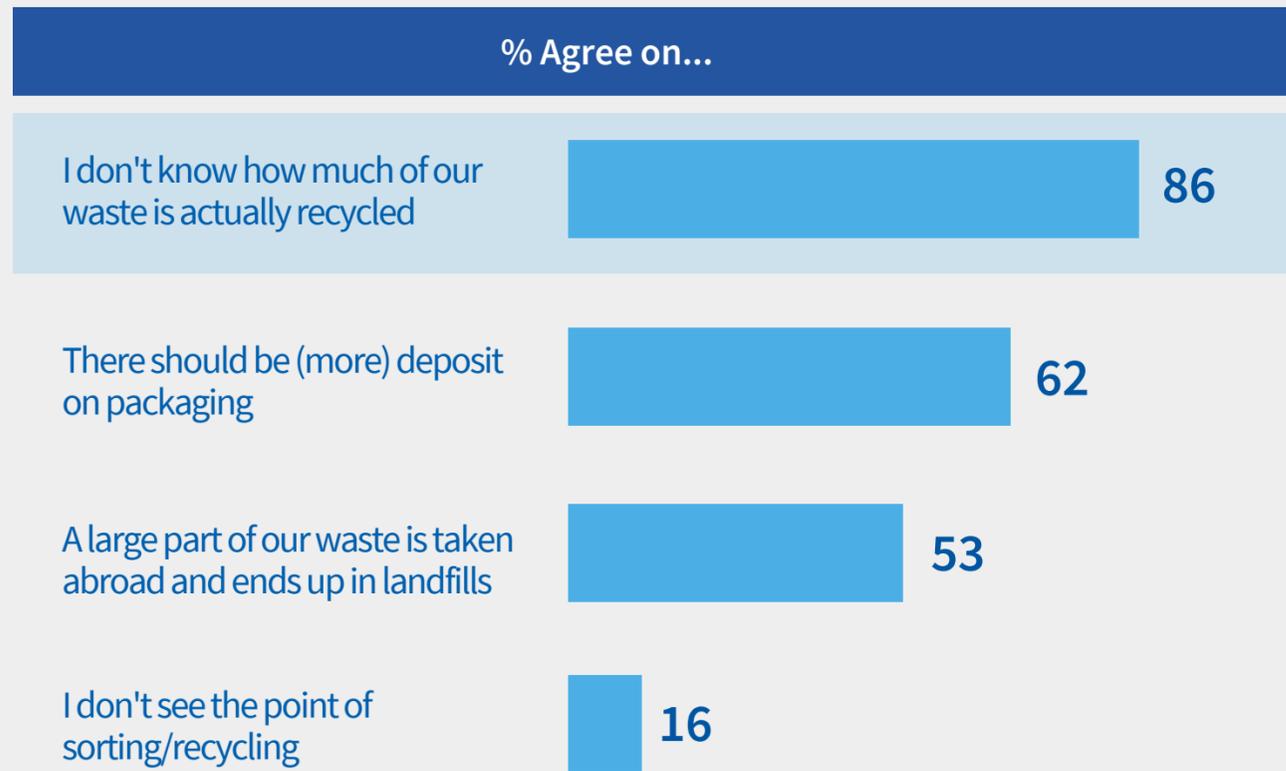


# Numbers

## The Netherlands

### Attitude and knowledge on recycling Consumers

Dutch consumers do not really know how much of their waste is actually recycled. 6 in 10 agrees there should be (more) deposit on packaging (=statiegeld).



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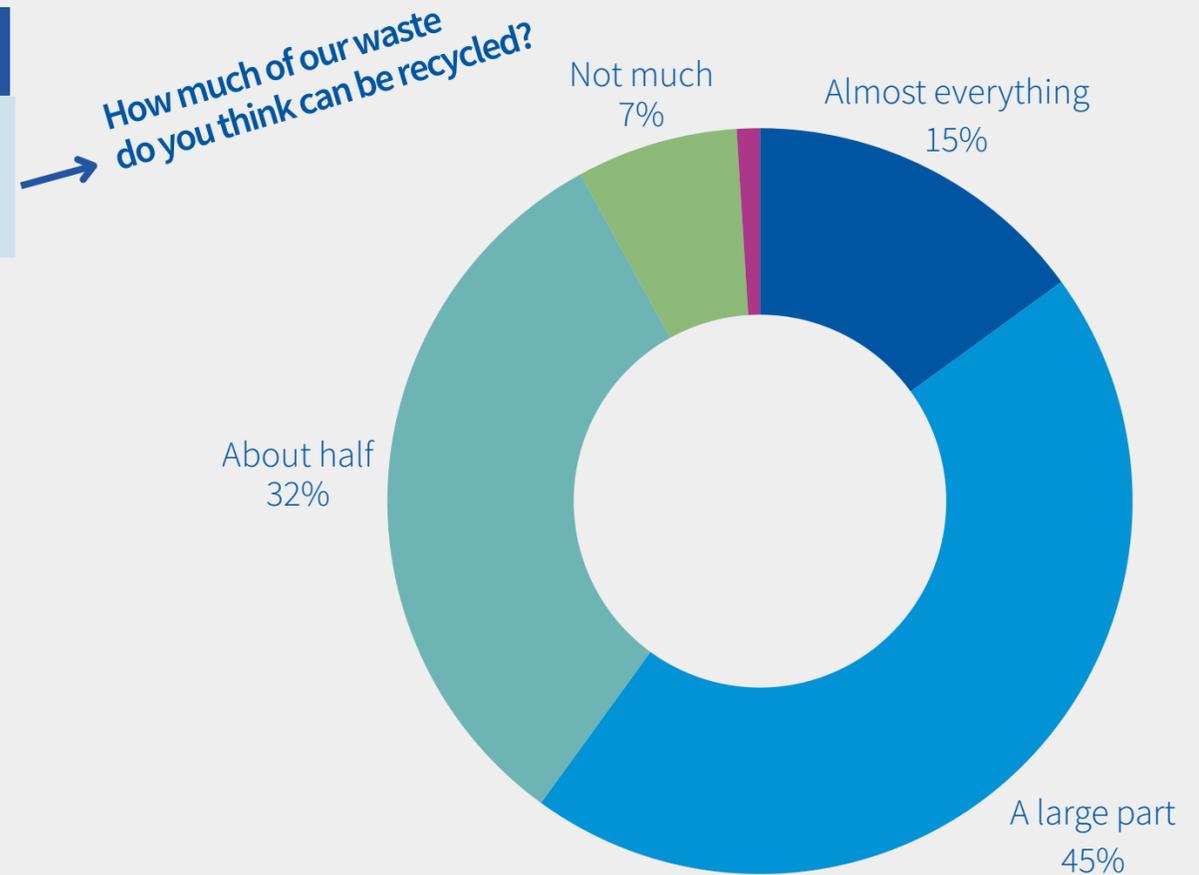
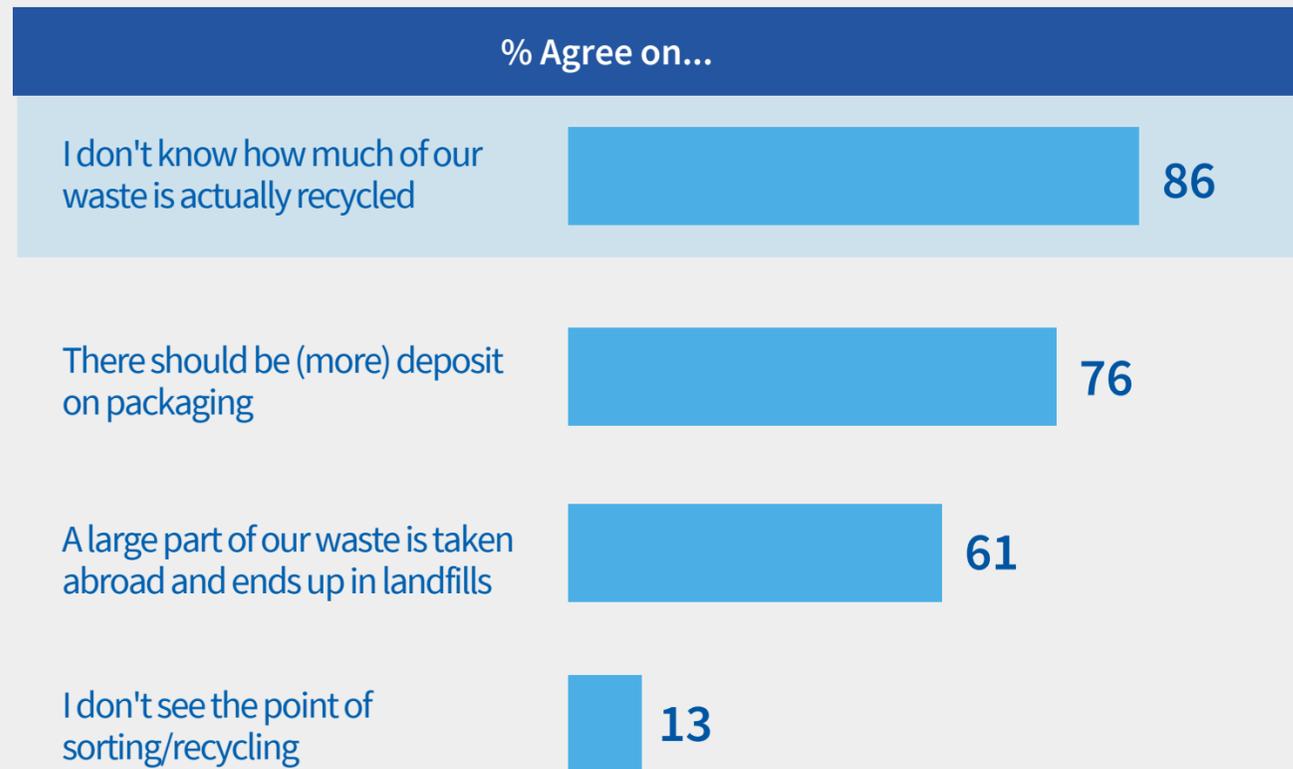
**Age difference**  
 Youth 18-24 more often do not see the point in recycling (20%) than the older generation of 55-70 (12%).

# Numbers

Belgium

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*“We think we’re on the right track, but the numbers tell a different story.”*

*If we want to meet our climate and circularity goals for 2035 and 2050, we need to translate good intentions into consistent behaviour, with better information, smarter guidance and clear rules.”*

Harld Peters, CEO Renewi



# Media contact

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