



June 2025

Istanbul Chamber of Industry, in cooperation with Ipsos, announced the “ICI Scores of Sustainability Trends in Industry 2025” in Türkiye

The Research on Sustainability Trends in Industry has been conducted for the second time in 2025 by the Istanbul Chamber of Industry (ICI) in cooperation with Ipsos Türkiye (Ipsos) to understand the current status and approaches of industrial organizations in Türkiye regarding sustainability.

The findings obtained from this research, conducted for the first time exclusively for the general industry in Türkiye, serve as a guide for ICI's future actions in the field of sustainability. Based on the findings from the research, the “ICI Scores of Sustainability Trends in Industry” have been calculated for the general industry for the first time in Türkiye in cooperation with Istanbul Chamber of Industry & Ipsos.

HOW WERE THE ICI SCORES OF SUSTAINABILITY TRENDS IN INDUSTRY CALCULATED?

The “weighted scoring” method was applied to determine the quality and scope of the scores in cooperation with ICI and Ipsos. This scientific method considers the relative significance of different factors or questions and generates a performance score based on these significance levels.

In this context, metrics were determined by selecting relevant questions from the questionnaire, and a weight was assigned to each question within the overall score. Within the framework of the score calculation, the weighted data was averaged to calculate Türkiye-wide scores.



OUTCOMES OF THE 2025 ICI SCORES OF SUSTAINABILITY TRENDS IN INDUSTRY:

In this regard, three different performance scores were calculated under the titles of “Awareness”, “Attitude”, and “Implementation”. Accordingly, the 2025 ICI Scores of Sustainability Trends in Industry are as follows:

AWARENESS SCORE



ATTITUDE SCORE



IMPLEMENTATION SCORE



According to these results, which were generated by considering different questions in each score group, the area where industrial companies across Türkiye achieved the highest score is ‘Attitude’ with 50.33. The industrial companies, which have a score of 31.91 in the area of attitude, are at a level of 16.14 for the Implementation score.

While the scores were calculated out of 100, an area of improvement was also calculated for each performance score.

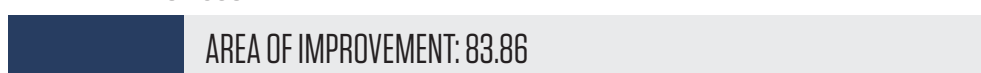
AWARENESS SCORE



ATTITUDE SCORE



IMPLEMENTATION SCORE





OUTCOMES OF THE 2025 ICI SUSTAINABILITY TRENDS IN INDUSTRY RESEARCH:

The outcomes of the 2025 Research on Sustainability Trends in Industry, conducted by ICI in cooperation with Ipsos to understand the current status and approaches of industrial organizations in Türkiye regarding sustainability, are as follows:

OUTCOME 1: Most companies are still in the initial stage of integrating sustainability into their corporate strategy.

OUTCOME 2: Companies have a limited level of knowledge regarding the sustainability agenda.

OUTCOME 3: Among the limited number of companies that set sustainability goals, economic sustainability remains a primary focus.

OUTCOME 4: Only **16 percent** of industrial organizations in Türkiye calculate their carbon footprint.

OUTCOME 5: The most important factor affecting sustainability targets and actions is “Laws and Regulations”.

OUTCOME 6: Industrial companies are most in need of “Incentives / Funding support” for sustainability implementations.

OUTCOME 7: The total rate of companies that release public reports on sustainability is **8 percent**.



OUTCOME 1

Most companies are still in the initial stage of integrating sustainability into their corporate strategy.

28%

The survey reveals that 28% of respondents are company or business owners, and the majority of participants hold senior management roles.

39%

The rate of companies with a sustainability unit and manager is 17%. 39% of the companies state that they export to European Union (EU) countries. The rate of companies that report under the EU Carbon Border Adjustment Mechanism is 8%.

69%

69% of the industrial companies participating in the research think that the issue of sustainability is a very important part of the company's vision.

34%

34% of industrial companies state that they have integrated sustainability into all processes of their business strategies and monitored its performance by setting SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) targets in all critical matters.

32%

Regarding sustainability, the rate of those who only follow and comply with new legal regulations and amendments in the legislation is also 34%, while the rate of those who stated they set targets beyond a compliance-oriented approach in projects on some topics, though not in all projects, is 32%.

The topic of sustainability, which covers environmental, social, economic, and governance factors, is of critical importance for the success of companies in today's dynamic and global markets. Within the scope of the research, although the rate of those stating that the issue of sustainability is a very important part of their company vision is 69%, this rate increases to 76% for companies exporting to EU countries. The fact that the EU is our most important export market also affects the sustainability orientation of our industry. On the other hand, the rate of companies stating that they have regularly integrated sustainability into their daily work routines and taken actions by setting measurable targets in this regard has increased compared to the previous year, reaching 34%.



OUTCOME 2

Companies have a limited level of knowledge regarding the sustainability agenda.

Participants in the research were asked about their level of knowledge regarding the Paris Agreement, Türkiye's 2053 net zero emission target, the United Nations Sustainable Development Goals, and the European Green Deal.

55%

The rate of those who stated they have knowledge about the Paris Agreement is 55%. For companies that export to EU countries, this rate is 65%.

51%

51% state that they have knowledge about Türkiye's 2053 net zero emission target. For companies that export to EU countries, this rate is 57%.

46%

46% of the research participants stated they have knowledge about the European Green Deal. For companies that export to EU countries, this rate is 60%.

44%

The topic that the fewest people stated having knowledge about is the UN Sustainable Development Goals, with 44%. For companies that export to EU countries, this rate is 57%.

The self-reported knowledge level regarding sustainability-related agenda topics in Türkiye is generally observed to be low. For topics other than the Paris Agreement and Türkiye's 2053 net zero emission target, the rate of those who say "I have no knowledge at all" and "I have very little knowledge" is higher than the rate of those who say "I have some knowledge" and "I have a lot of knowledge". However, in companies that export to the EU, the level of knowledge on all topics shows an increase.



OUTCOME 3

Among the limited number of companies that set sustainability targets, targets related to economic sustainability are central.

25%

Only 25% of the industrial companies participating in the research stated that they have set a sustainability target for the year 2024.

65%

Economic sustainability is the most common focus among industrial organizations that set sustainability targets. According to the research, 65% of those establishing targets for 2024 addressed economic sustainability.

60%

Environmental sustainability was targeted by 60% of companies setting goals for 2024, while 41% included objectives related to social sustainability.

Sustainability refers to the ability of companies to achieve their objectives by integrating economic, social, and environmental risks and opportunities into their strategies, while creating long-term value for all stakeholders. According to the findings, only 25% of industrial companies included in the research have established a sustainability target for 2024, covering economic, environmental, or social aspects. Among those, economic sustainability was the most frequently cited focus (65%), followed by environmental (60%) and social (41%) targets. While companies in the general research prioritize economic targets in the field of sustainability, environmental targets are more common (75%) in companies that export to the EU.



OUTCOME 4

Only 16 percent of industrial organizations in Türkiye calculate their carbon footprint.

88%

Among the environmental sustainability actions specified within the sustainability targets, “increasing recycling” with approximately 88% and “cleaner production processes” with 87% stand out as the most frequently defined as “high priority”. In third place, with 79%, comes “investments in sustainable products”.

38%

The lowest “high priority” actions are expressed as “biodiversity and ecosystem projects” (38%).

69%

While the rate of those who expressed the “circular economy and business models” step as “high priority” is 69%, the rate of those who defined “low-carbon energy consumption” as “high priority” is 58%.

16%

Only 16% of the industrial organizations in Türkiye that participated in the research stated that they calculated their carbon footprint.

97%

Among the social and economic sustainability actions specified within the sustainability targets, “occupational health and safety” with a rate of 97% and “human rights and working conditions” with 95% stand out as the ones most frequently defined as “high priority”. In 3rd place is “work ethics” with 93%, while “transparency and reporting” is in 4th place with 92%.

Within the research, the rate of companies that state they calculate their carbon footprint is 16%. Among companies that export to the EU, the rate of those who state they calculate their carbon footprint increases to 26%.

Notably, in the context of environmental sustainability priorities for the upcoming 12 months, only a limited number of companies have identified high-impact measures—such as low carbon energy consumption—as top priorities. Accordingly, it is evident that a more intensive effort is needed to raise awareness among companies about combating climate change.



OUTCOME 5

The most important factor affecting sustainability targets and actions: “Laws and Regulations”

76%

76% of the participants think that the top management of companies (Board of Directors, Company owner, general manager, etc.) is responsible for achieving their sustainability targets. For those who export to EU countries, this rate is 84%.

48%

48% of the research participants state that the top management of their companies only follows the agenda on sustainability and monitors some mandatory developments such as laws, regulations, legislation, etc.

72%

72% of the industrial organizations in Türkiye that participated in the research stated that “Laws and Regulations” play a major role in the steps they take towards sustainability. For those who export to EU countries, this rate is 79%.

As sustainability becomes an important factor in competition, it necessitates more leadership and integration in the field of sustainability. In companies that export to the EU, these issues are more widely addressed, which stands out as a result of international competition. In this context, while the importance of leaders’ commitments to sustainability increases, legal regulations stand out as an effective tool for industrial companies in Türkiye to take action on sustainability.



OUTCOME 6

Industrial companies are most in need of “Incentives/Funding support” for sustainability implementations

59%

59% of the industrial companies participating in the research agree with the statement that innovative developments and innovations in sustainability contribute to the company's success and profitability. For those who export to EU countries, this rate is 71%.

64%

64% of companies with sustainability targets have a budget allocated for investments to achieve their targets.

31%

Within the research, industrial companies in Türkiye stated that they are most in need of “Incentives/Funding support” (31%) for sustainability implementations. 22% of the participants stated that they need “Information/ Training” support in the first place.

11%

6% of participants stated “Energy efficiency study”, 11% “Consultancy”, and 9% “Capacity building” as their primary needs.

10%

The rate of companies stating they have benefited from sustainable finance products and services for the financing of sustainability projects is 10%.

Among sustainable finance implementations, the need for financial support in areas such as combating climate change, transitioning to a low-carbon economy, and green transformation is becoming more widespread every day. Although companies in the research state that they most need “Incentives/Funding support”, the rate of companies using sustainable finance products and services for financing sustainability projects in Türkiye has remained limited to **10%**, showing a decrease compared to the previous year.



OUTCOME 7

The total rate of companies that release public reports on sustainability is 8 percent.

20%

20% of the companies participating in the research state that they have defined processes for identifying, positioning, and including priority stakeholders in their sustainability efforts. For companies that export to EU countries, this rate is 28%.

43%

In 43% of the companies that stated having defined processes, these processes are carried out in the form of “ensuring regular and mutual information flow and integrating demands and expectations into the business strategy”.

8%

The rate of companies that state they released public reports on sustainability is 8%. For companies that export to EU countries, this rate is 11%.

39%

The rate of those who are considering conducting a detailed self-assessment study to understand the maturity level of sustainability in their companies within the next 12 months is 39%. For companies that export to EU countries, this rate is 50%.

According to the research findings, a limited number of companies state that they released public reports on sustainability. While this issue is more widely addressed in companies that export to the EU, it is thought that steps should be taken in the coming period for transparent sharing with stakeholders, which is an important stage in terms of the sustainability approach and performance.



RESEARCH DETAILS:

Sample: The research design targeted industrial organizations in Türkiye, taking into account the 10-sector groups covering ICI's 55 professional committees.

According to the monthly bulletin data from the Social Security Institution (SSI) in February 2022, there are a total of 264,622 organizations in Türkiye, across 20 industry branches under 10 main sector groups. The list of organizations throughout Türkiye was provided by Ipsos from official institutions, while the list of ICI members was used for the province of Istanbul.

The proposed sample for the research was structured according to this distribution, and within this scope, the sample size for the research was determined as 585 (4.0% margin of error). As a result of the survey conducted with a quantitative questionnaire prepared for the research, the number of successful surveys was 606.

MAIN SECTOR GROUP THROUGHOUT TR	NUMBER OF ESTABLISHMENTS IN TR	TARGETED SAMPLE	COMPLETED SURVEYS
1. Apparel Industry	40,114	76	79
2. Machinery, Parts and Metal Goods Industry	54,498	103	107
3. Chemicals, Plastics and Rubber Products Industry	21,734	41	42
4. Textile Products Industry	19,584	37	38
5. Forest, Paper Products, Furniture and Printing Industry	51,971	92	95
6. Electrical Equipment and Electronic Products Industry	10,473	47	49
7. Food Products Industry	47,777	91	94
8. Metals Industry	7,195	31	32
9. Mining, Stone and Soil Products Industry	6,392	39	40
10. Land Vehicles, Sea Vessels and Supply-Industries	4,884	28	30
TOTAL	264,622	585	606

*For the sector-based results to be statistically significant (minimum 30 basis), the proportion of companies in the Metals, Mining, Stone and Soil Products Industry, and Land, Sea Vehicles and Sub-Industry sectors was kept high in the sample compared to the total. A quota was followed based on ICI's 10-sector distribution specifically for Istanbul.

*As more or less successful surveys were achieved in some quotas, the collected data was weighted at the end of the field according to the specified quotas. In the weighting process, the Rim Weighting Efficiency was calculated at 97.2%.



In the research, the distribution of companies in the NUTS1 12 Region was taken into account, and the surveys were conducted within the framework of established quotas. Accordingly, approximately 33% of the companies in the research are located in Istanbul.

NUTS1 12 REGIONS	COMPLETED
Mediterranean	47
Western Anatolia	74
Western Black Sea	19
Western Marmara	26
Eastern Black Sea	8
Eastern Marmara	80
Aegean	85
Southeastern Anatolia	35
Istanbul	198
Northeastern Anatolia	3
Central Anatolia	23
Middle Eastern Anatolia	8
TOTAL	606

While 95% of the companies whose business size data was collected within the research have 1-49 employees, 4% have 50-249 employees, and 1% have 250 or more employees.

BUSINESS SIZE	COMPLETED
1-49 Employees	577
50-249 Employees	25
250 and More	4
TOTAL	606

Method: The surveys within the research were conducted with the decision-making authorities of the companies. The fieldwork of the research, which used hybrid methods of CATI (telephone survey) and CAWI (online survey) considering the access limits to the relevant persons, was carried out between December 2, 2024, and February 5, 2025.

METHODOLOGY	COMPLETED
CATI	521
CAWI	85
TOTAL	606

The quantitative questionnaire form, created by ICI and enriched by Ipsos, is designed to be approximately 20 minutes long. The quantitative research addressed the following topics:

- Knowledge levels and awareness of organizations on sustainability
- Current sustainability practices and targets in organizations
- Future planned sustainability practices and targets in organizations
- Difficulties experienced in sustainability practices and legislation
- Support expected by organizations in their sustainability business plans



İSTANBUL
CHAMBER OF INDUSTRY

About Istanbul Chamber of Industry

Since its establishment in 1952, the Istanbul Chamber of Industry (ICI) has continued its activities with the strength it derives from its members' contributions to the Turkish economy, as the largest chamber of industry in Türkiye and one of the strongest representatives of the Turkish industry. The share of the value-added created by ICI members within Türkiye's industrial sector value-added is over 33%, and ICI members account for approximately 30% of Türkiye's industrial sector production.

The Istanbul Chamber of Industry offers innovative services to its members, thereby supporting the sustainable development of our industry and contributing to the enhancement of its competitive power. To this end, it develops and makes available new projects and services with domestic and international partners on vital issues for our industry, such as innovation, technology development, university-industry cooperation, vocational training, international relations, environment, and energy. Possessing the most extensive knowledge about the Istanbul industry, ICI guides our industrialists with the economic research it conducts and the data it compiles, while also contributing to the shaping of economic and industrial policies.

About Ipsos

Ipsos Türkiye continues operating as a part of Ipsos, one of the leading research companies in the world, serving more than 5,000 customers in 90 countries.

Ipsos Türkiye is a market research company providing modelling and consultancy services through advertising, customer and employee satisfaction, marketing, media and public researches. With its almost 500 employees, it holds the leading position in Türkiye. Defining itself as the home of passionate researchers and researches, Ipsos is the organization that has the highest number of researchers in our country, Türkiye, after TURKSTAT. The company's experienced researchers and advanced research tools enable the company to generate high-quality solutions in the entire process, from the initial creation stage to the brand / service / product development stages. Ipsos works as a solution partner with its customers in the fields of fast-moving consumption, retail trade, durable consumption, health, technology, finance, automotive, media, tourism and many others. As a holder of ISO 9001:2015 and the Trustworthy Research Certificate (GAB), Ipsos conducts its work within the framework of these quality standards.

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Contact

Istanbul Chamber of Industry
Sustainability, Energy and Environmental Transformation Department
surdurulebilirlik@iso.org.tr

Ipsos
trinfo@ipsos.com

