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Circular Economy & Industry in 2035

Citizen-consumer expectations and behavior

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1. Definitions

1.1. Defining the report topic

Socially responsible consumption

All consumption behaviors in which individuals consider the public consequences of their private consumption and use their purchasing power to bring about changes in society (François-Lecompte and Valette-Florence, 2006).

“Responsible consumption consists of all voluntary acts within the sphere of consumption undertaken after becoming aware of consequences of consumption for the world beyond oneself that are considered negative; these consequences therefore concern neither the functionality of purchases nor immediate self-interest” (Özçaglar-Toulouse, 2005).

Seventy-eight percent of French people would be willing to make more responsible consumption choices for the good of the planet and the environment (Greenflex & Ademe, 2023).

Five key factors characterizing socially responsible consumers

1. Refusing to buy from organizations whose behavior is considered irresponsible
2. Intending to buy products for which a portion of the price goes to a specific cause
3. Wanting to support small businesses
4. Being concerned about geographic origin
5. Reducing consumption to what is necessary

1.2. Relevance to the study and key questions for the future

The boundaries between consumers and citizens are harder than ever to define

Responsible consumption constitutes a form of protest expressed through purchasing decisions, since the democratization of responsible consumption involves personal engagement. In this sense, it approaches the concept of “political consumerism” (Micheletti, 2004) and moves away from responsible consumption understood as a collection of dispersed, voluntary practices. Through their purchasing practices, consumers sensitive to social and environmental causes would, in a sense, play a political role, illustrated by the expression “buying is voting” (Waridel, 2005).

Consumers are the main catalyst for circular business models (Kirchnerr et al., 2017)

The social objective of the circular economy is the sharing economy, increased employment, participatory democratic decision-making, and more efficient use of existing physical material capacity through a cooperative and a community of users (groups of users making use of value, service, and function), as opposed to a culture of consumers (individuals consuming physical products) (Korhonen et al., 2018).

The growing role of responsible citizen-consumers

Promoting consumer responsibility is crucial to the circular economy (Ghisellini et al., 2016). This individual expression of consumer protest and political engagement forms part of a collective approach and, as such, constitutes “individualized collective action” (Micheletti, 2003, 2004; Trautmann, 2004; Dubuisson-Quellier and Barrier, 2007).

Consumers are becoming increasingly active in defining their needs and have growing power through their purchasing decisions. This trend affects the uppermost levels of the value chain, not just retailers or final producers.

2. Retrospective analysis

2.1 Past developments

Growing demand for responsible consumption

The history of responsible consumption dates back to the early twentieth century, with movements such as Arts and Crafts, but it gained importance with the economic prosperity that followed World War II. The 1960s and 1970s saw environmental movements emerge, followed by the introduction of ecolabels in the 1980s and 1990s. During the 2000s, social awareness increased, leading to growing demand for ethical products. The 2010s marked the popularization of responsible consumption through the internet and government initiatives, making it a global phenomenon centered on environmental, social, and ethical concerns (World Economic Forum, 2013).

As early as 1798, Thomas Malthus, in his *An Essay on the Principle of Population*, warned of the consequences of an ever-growing population, emphasizing its potential to exceed the earth's capacity to provide subsistence (World Economic Forum, 2013).

Global discussions have evolved over the years, but the global pursuit of responsible consumption and production is more relevant than ever (United Nations, 2023). Although sixty-two countries, in addition to the European Union, have introduced 485 policies to support the transition toward more sustainable consumption and production patterns, progress is still needed: The per capita material footprint in high-income countries is ten times that of poor countries (United Nations, 2023).

Practical actions in consumers' daily lives

The Anti-Waste Law seeks to introduce measures to reduce waste in French people's daily lives between 2021 and 2025. Numerous actions are envisaged, including promoting sales in bulk to reduce packaging, banning the disposal of unsold nonfood products (e.g., clothing), and recovering biowaste, among others, with the aim of ending the marketing of single-use packaging by 2040 and placing the circular economy at the heart of public procurement (MTE-MCT, 2023b).

Growing awareness of the climate emergency and the emergence of new markets and consumption patterns

Raising consumer awareness also heightens consciousness. Indeed, growing interest in environmentally friendly products, the proliferation of bottom-up initiatives such as do-it-yourself movements, the consolidation of exchange and sharing platforms, and the increasingly widespread belief that younger generations tend to favor experience over ownership all point to such a behavioral shift (Todeschini et al., 2017).

This is also reflected in businesses, which can find alternatives that allow them to consume differently. For example, Coopalim, a cooperative supermarket in Strasbourg, furnished its premises entirely with secondhand furniture and/or items recovered from former stores. The retailer is also considering joining peer-to-peer rental platforms for tools it uses only occasionally.

Renting thus provides an alternative to buying a new item when it would not be used to its full potential.

At the same time, consumers play a role in introducing bottom-up change by adopting circular innovations (Hazen et al., 2017; Ranta et al., 2020) and pro-environmental attitudes and behaviors (Confente et al., 2020; Sarigöllü et al., 2020; Dzhengiz et al. 2023).

Legislative developments

Regulations on extended producer responsibility (EPR) require producers to organize and pay for the treatment and recycling of waste from their products at the end of their useful lives (e.g., batteries).

Under various European Union directives and member states' national implementing laws, consumers can return any electronic waste, packaging, or batteries free of charge to a municipal collection point or a retail outlet (Kunz et al., 2018).

The trauma of the public health crisis

The public health crisis had a palpable traumatic effect on consumption patterns. It reshaped accessibility, with local options becoming more accessible and thereby encouraging more responsible consumption.

Similarly, the war in Ukraine and the inflation that followed brought back into focus the major role that socioeconomic, political, and geopolitical contexts play in the willingness to consume responsibly. More specifically, this demonstrates the predominance of the "price" factor in decisions about responsible consumption.

2.2 Current developments

Development of the collaborative economy in various forms (sharing, renting, leasing)

Retaining product ownership (RPO), product life extension (PLE), and design for recycling (DFR) are major circular economy strategies, but they still present barriers for consumers, particularly in terms of cost (Atasu et al., 2021).

Barriers to the development of responsible consumption solutions

Responsible consumption requires an effort that limits its adoption by some consumers; 68% find that making the right choices is an increasingly burdensome and exhausting task (Greenflex & Ademe, 2023).

For example, the effort required to access a product, contamination by other people, a lack of trust in the provider and the service, product quality, and specific product characteristics illustrate some of the barriers to the development of the collaborative economy (Tunn et al., 2021).

These barriers stem from various constraints. First, intrinsic constraints depend on individuals and are rooted in their values and their education in responsible consumption. Extrinsic constraints, meanwhile, encompass economic issues (purchasing power, prices), issues relating to social pressure and social representations, practical factors (product accessibility, the number of choices available), and legal factors.

The impact of "price" and values on responsible consumer behavior

Price-related barriers are particularly interesting in the context of responsible consumption. A price decrease can lead to an increase in responsible consumption. For example, products that help prevent waste or apps such as "Too Good To Go1" enable more virtuous consumption and less waste at a lower cost. The same reasoning can apply to secondhand fashion. Conversely, rising prices can also steer consumers toward lower-quality products that are, as a result, cheaper: In this case, a low price will be a negative indicator for responsible consumption.

These constraints are compounded by a broader variable based on perceptions of responsible consumption: These perceptions are subjective, grounded in values—particularly altruism—and education, and also shaped by sociodemographic factors (2021).

Increasing consumer distrust of initiatives labeled responsible by companies

Skepticism about companies, their involvement, and their true motivations remains very strong among French people, 85% of whom need evidence before believing brands' commitments (Greenflex & Ademe, 2023). The commercial overexploitation of the concept of sustainable development and abuses such as greenwashing thus lead consumers to various forms of protest, ranging from simple skepticism to organized resistance strategies (Monnot & Reniou, 2013). Indeed, 69% of French consumers go so far as to say that advertising should give priority to products that are more respectful of the environment and health

(Greenflex & Ademe, 2023), as a form of sanction against companies that make little or no effort to honor their commitments.

This trend is also rooted in consumers' calls for greater transparency and their increasingly demanding expectations regarding the quality of supposedly "responsible" consumption: 76% of French people would like to know how products affect the health of the planet (Greenflex & Ademe, 2023). Social media contribute to this trend by enabling online activism to develop and exposing practices that had previously been invisible to end consumers. For example, the exposure on Instagram of the forced labor conditions faced by Uyghurs in China prompted numerous news outlets and public figures to publicly share the names of the companies implicated (Ouest-France, 2023). Boycotts consequently seem more legitimate and justified.

Consumers believe that companies share responsibility for responsible consumption. Indeed, 85% of French people think that companies have a major role to play in developing responsible consumption across several areas (Greenflex & Ademe, 2021). First, by improving their offerings to provide healthy, simple, and accessible products. Next, by committing to reducing their environmental footprint and addressing societal issues. Finally, by putting advertising to work in support of more sustainable consumption.

Food as a powerful symbol of responsible engagement

Awareness of food waste is growing; in France, it amounts to ten million metric tons a year, with a commercial value of approximately €16 billion (MTE-MCT, 2023a). Given that more than one-third of losses and waste occur at the consumption stage (MTE-MCT, 2023a), various measures, both governmental and nongovernmental, seek to inform and educate consumers to facilitate the adoption of waste prevention practices, such as better understanding food expiration dates, using leftovers and managing quantities more mindfully, and planning purchases (MASA, 2022).

The number of food products labeled "green" or "responsible" is surging, alongside organic food, which has become increasingly popular and more firmly embedded in consumers' daily lives in recent years: France ranks second in Europe for organic food consumption (Bioaddict, 2023).

Plant-based diets are booming at the expense of meat and fish consumption: 31% of French people avoid these products for reasons related to the environment and human and animal health (Greenflex & Ademe, 2023). This behavioral change is particularly evident among young people from the most socially advantaged backgrounds (Iribarnegaray, 2021), although 74% of French people still describe themselves as omnivores (IFOP, 2021). However, 84% of French people say they pay attention to the effects of what they eat on their health but do not intend to change their diets (IFOP, 2020). To reduce their environmental footprint and meet growing demand, mass-market retailers (Cugny, 2023) and fast-food restaurants (De Champs, 2022) are also embracing this trend.

Decoupling the satisfaction of needs from resource consumption

Consumers are increasingly turning to alternatives that no longer require the consumption of new resources to meet their needs. This includes greater use of the collaborative economy in its various forms (sharing, renting, leasing—for example, equipment sharing between companies or deposit-return systems), as well as do-it-yourself practices, self-production, and repair (e.g., workshops to make one's own laundry detergent or repair household appliances, and repair services). Today, responsible consumption mainly involves consuming durable, less-polluting products (33%) and reducing consumption (31%), for example by eliminating unnecessary purchases (30%) (Greenflex & Ademe, 2021).

The quality of goods over quantity

Sixty-seven percent of French people say they choose sustainable products because they are of higher quality. Along similar lines, the three main dimensions of responsible consumption encompass local products

(47%), waste reduction (28%), redefining needs (25%), and environmental responsibility (organic, seasonal products) (24%) (ObSoCo-CITEO, 2021).

This can be described as “lowsumerism,” as opposed to compulsive consumption: 54% of French people say they already limit purchases of new products, more for economic reasons (63%) than environmental ones (37%) (Greenflex & Ademe, 2023). This involves a commitment to owning and using only a limited quantity of goods over a specified period (for example, clothing over a season or a year) and adopting a generally critical approach to consumption, giving priority to the conscious and moderate acquisition of new goods (Todeschini et al., 2017).

For companies, this may translate into declining demand, leading them to redefine needs and sales strategies, given that 82% of French people have made a positive change in their consumption habits, particularly by choosing to consume less and seeking to have a lower environmental impact (Greenflex & Ademe, 2023). Companies therefore need to consider alternative solutions, such as selling less but offering higher quality at higher prices. Responsible consumption thus calls for rethinking how the value chain and manufacturing process are designed. This requires new resources and skills that entail implementation costs for the company. To address this new constraint, the circular economy offers companies an opportunity through business models based on product-service systems (a type of functional economy model within the circular economy). Companies can thus meet consumers’ needs through bundled offerings of products, services, and infrastructure (Tunn et al., 2021). For example, selling services rather than goods is familiar in hotels and public transportation; it must become commonplace across different areas of consumption (Stahel, 2016).

3. Foresight exploration

3.1 Structural trends

An exponentially escalating climate emergency

The climate emergency appears to be well underway, and turning back is no longer possible. Growing awareness of this phenomenon seems likely to endure over the long term, creating favorable conditions for the adoption of measures to slow global warming. Efforts to reduce growth, or even pursue degrowth, are underway and more necessary than ever.

Renting versus owning goods

As the collaborative economy develops, consumers appear to be questioning ownership of goods and gradually embracing leasing and borrowing models. Initially, this adoption meets an occasional need that does not require buying a new item and for which renting appears to be the most appropriate choice. Environmental concerns also play a role, with a desire to avoid producing a new item when one already exists. Yet the price of renting remains crucial as well, since it avoids the purchase and maintenance costs of equipment. This trend nevertheless invites consumers to rethink their relationship with ownership and embrace a new perspective on shared consumption.

Consumers gaining power

Consumers are increasingly taking an active role in their consumption. In other words, they can not only decide to boycott certain products or turn to alternative products or services but also exert growing pressure on companies. By demanding greater transparency, consumers demonstrate rising expectations regarding corporate responsibility and the responsible nature of the goods and services produced. This trend is gaining momentum and naturally puts pressure on producers, which must respond to maintain their consumers’ trust.

Rethinking the economic model

Ninety-three percent of French people believe that the economic model should be partly or completely overhauled and reoriented to give greater consideration to human and planetary health priorities (Greenflex & Ademe, 2023).

3.2 Major uncertainties

The pace at which global warming accelerates

Although forecasts are alarming, it is difficult to know precisely what effects global warming will continue to have on the means of production and how these effects will resonate in consumers' imaginations and decision-making processes. As the COVID crisis showed, certain experiences have endured as major historical events with social, psychological, and economic effects on consumption patterns. Given its uncertain and potentially severely harmful nature, global warming risks intensifying the sense of urgency and triggering more extreme consumption responses that are difficult to predict: Rejection of responsible consumption or its radicalization?

The impact of eco-anxiety on consumers

Eco-anxiety (also called ecological grief or the climate curse): The chronic fear of an environmental cataclysm arising from observing the apparently irreversible impact of climate change and the resulting concern for one's own future and that of future generations (Clayton et al., 2017). Sixty-seven percent of French people report feeling fear about the future (Fauroux, 2022).

There is a strong correlation between eco-anxiety and sustainable behaviors: Frequent concern about the environment leads to positive environmental actions and behaviors—including environmental advocacy—suggesting that the phenomenon has useful social benefits (Roberts & Lauchlan, 2020).

Personal lifestyle changes, such as adopting a vehicle that does not depend on fossil fuels and reducing red meat consumption, can have a significant impact on greenhouse gas emissions if implemented worldwide. Yet not enough individuals are making these changes, which could be partly due to the level of anxiety they feel (Pickering & Pickering, 2023). Similarly, it remains difficult to know how eco-anxiety will affect sustainable consumption, or even whether people experiencing eco-anxiety will place greater emphasis on the "consumption" component and, if so, how. Some may seek to commit more strongly to responsible consumption as a way of contributing to efforts to save the planet, whereas a more "cynical" outlook could lead others to continue consuming excessively and carelessly, since "the world is doomed anyway . . ."

The supply and accessibility of responsible products

Given that price remains a barrier for consumers (Atasu et al., 2021), consumers' ability to accept higher costs may emerge as a future trend, combined—or not—with companies' efforts to incorporate these responsibilities into their offerings at a lower cost.

3.3 Controversies

The risk of cultural and political conflict

Responsible consumption remains divisive within populations. There is thus a risk of cultural and political conflict between environmental advocates and defenders of inaction. Examples include extremist political figures such as Trump coming to power and the use of the term "ecoterrorism" in France. The issue is divisive across sociodemographic and generational lines. Indeed, "rejection of the idea of a climate emergency is more prevalent among affluent, less-educated, and rural segments of the population" (ObSoCo-CITEO, 2021).

Within the population, a gulf is also widening between individuals who can afford responsible consumption and those who remain vulnerable to the fluctuations of their budget constraints, particularly in an inflationary environment. It could therefore be difficult to unite all stakeholders around a common front.

Producer inaction

For people to consume sustainably and responsibly, these offerings must be accessible. Yet fewer than half of organizations are rethinking their products and design processes to improve sustainability, including the sustainability of their products and services (Capgemini, 2022).

Legislation versus commitment

In general, legislation on responsible corporate behavior is increasingly governed by laws and standards that companies must comply with or face fines and other sanctions. The Anti-Waste Law is one example. When it comes to individuals, however, legislation creates a dependence on the commitment of consumers (Kunz et al., 2018), who act of their own free will.

For example, cities are required to provide a waste-sorting system, but consumers are responsible for deciding whether to follow it, since some countries—such as France—do not yet provide for penalties against individuals who ignore this type of requirement. European laws on electrical and electronic waste, or "e-waste," have existed for several years, encouraging individuals to return items such as used batteries and light bulbs to stores and waste collection centers (Parlement Européen, 2020). This raises the question of whether a more binding legislative system for consumers will develop, along the lines of economic theories advocating a polluter-pays penalty. At the same time, one may question the effectiveness of a more punitive regulatory approach relative to a more educational one in encouraging action. In any event, penalties targeting consumers who fail to comply with certain rules related to corporate social responsibility (CSR) (e.g., waste sorting) may be introduced to make individuals more accountable.

Unintended adverse effects in a responsible consumption cycle?

Several studies examine the downsides of the circular economy (e.g., Meshulam et al., 2023), particularly actions that may lead to overconsumption rather than benefits for society and the environment (Chatterjee et al., 2023). For example, purchases of secondhand clothing have regained popularity for several reasons, including a desire to counter a fast-fashion system that is harmful in various respects (Global Fashion Agenda, 2022), as well as the ease of access offered to consumers by digital sales platforms such as Vinted. Under certain conditions, however, these practices can stimulate the overconsumption of secondhand clothing (Parguel et al., 2017).

3.4. Weak signal/seed of change

Rethinking production to rethink consumption

Consumers pay particular attention to how the goods they buy are produced. The arrival of innovative new means of production and/or a return to older methods can therefore provide alternative solutions for rethinking how we produce and create new, more virtuous markets. Examples include permaculture, which can be highly profitable and produce ten times as much as a conventional farm (Franceinfo, 2017), and repairing objects, which is still not firmly established in French people's practices: When a given product breaks down, only 36% repair it, while an average of 54% replace it and 10% neither repair nor replace it (ADEME & Harris Interactive, 2020).

Encouraging people to take action is therefore essential for the further development of this market, which benefits from measures linked to France's Anti-Waste Law, such as the repair bonus for household appliances (Boluze, 2024), and apps such as "Too Good To Go," which seek to encourage the consumption of food products that would otherwise be discarded prematurely.

Boycotts and activism

With social media, the growth of online activism enables the exposure of corporate practices that had previously been invisible to end consumers. This is followed by efforts to boycott certain companies (e.g., the giant Shein) or major marketing events (e.g., Black Friday). The internet also serves as a preferred channel for communicating about protest actions, such as store occupations.

Consumer education as a remedy (Garmulewicz et al., 2018; Govindan & Hasanagic, 2018).

The state's role in educating its citizens deserves emphasis (Sarigöllü et al., 2020; Dzhengiz et al. 2023). Consumers' awareness and adoption of good practices can provide fertile ground for change, as illustrated by the 68% of French people who favor products that do not contribute to deforestation and the 73% who are concerned about the impact of the products they consume once discharged into water (Greenflex & Ademe, 2023).

3.5 Disruption

Crisis and responsible consumption: Between price and environmental priorities

Responsible consumption could become increasingly marginal, primarily because economic barriers deter the majority of consumers. In crisis situations where environmental problems may take a back seat, such as economic crises or climate uncertainty, the priority given to ethical consumption choices could be called into question entirely. When individuals face financial constraints or more immediate concerns, adopting sustainable consumption behaviors may be relegated to a secondary position.

Industrial innovation as a driver of more responsible consumption

Manufacturers succeed in developing highly competitive sustainable offerings by fundamentally rethinking their business models, encouraging widespread adoption of responsible consumption and thereby making it the dominant norm in society.

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