

SUSTAINABLE CONSUMPTION IN ALBANIA

A Comprehensive Analysis of Consumer Behavior
Market Readiness, and Institutional Trust

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The views expressed in this publication are those of the authors and do not necessarily represent those of the United Nations, including United Nations Development Programme (UNDP) or the UN Member States.

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Acronyms

| | |
|----------------------|--|
| A+++ | Energy-efficiency label/class |
| ANOVA | One-way Analysis of Variance |
| Business4SDGs | Business Partnerships and Solutions for SDGs |
| CAPI | Computer-Assisted Personal Interviewing |
| EU | European Union |
| INSTAT | Institute of Statistics (Albania) |
| PCA | Principal Component Analysis |
| PPS | Probability Proportional to Size |
| PSU / PSUs | Primary Sampling Unit(s) |
| RASFF | Rapid Alert System for Food and Feed |
| SDG / SDGs | Sustainable Development Goal(s) |
| SPSS | IBM SPSS Statistics |
| UN | United Nations |
| UNDP | United Nations Development Programme |
| VC / VCs | Voting Centre(s) |
| WTP | Willingness to Pay |

Executive Summary

This report presents the findings of a national urban consumer survey conducted in autumn 2025 to understand how people in Albania perceive sustainability and how they do or do not translate these perceptions into everyday consumption choices. The findings are interpreted against a context of ongoing EU-alignment reforms, tight household budgets, and strong public concerns about product safety and waste management.

Key findings

1

Green by necessity, not ideology

Many Albanians already engage in “greener” behaviours out of necessity not conviction: they buy only what is necessary, keep products in use for longer, and save energy and water to protect household budgets. These patterns are strongest among older and financially strained groups.

2

Food safety anxiety shapes everyday choices

Concerns about pesticides, hygiene, and expiry dates drive protective routines such as washing food, checking labels and dates, and relying on trusted sources. These behaviours often overlap with sustainability outcomes, even when they are not understood as “environmental” actions.

3

Systems and trust are the weak links

Behaviours that depend on infrastructure and institutions—waste sorting, access to credible certified products, and willingness to pay more for eco-options—remain limited. Many consumers perceive “green” products as expensive, hard to find, and not reliably verified.

4

High confusion about what is truly green

Among those who try to buy greener products, around three in four report uncertainty about which products are genuinely better. Labels and logos still carry less weight than a known farmer, a familiar shop, or other signals of safety and authenticity—especially for food products.

A. Background and Rationale

Albania's sustainable consumption landscape is evolving under the combined pressure of household economic constraints, shifting market expectations, and the longer-term modernisation agenda linked to EU integration. As the private sector becomes increasingly exposed to international sustainability standards and SDG-oriented business expectations, understanding how consumers perceive, and practice sustainability is increasingly important for making realistic progress toward SDG 12 (Responsible consumption and production) and the Green Agenda for the Western Balkans.

This consumer report is prepared within UNDP Albania's "*Business Partnerships and Solutions for SDGs*" (Business4SDGs) UN joint project, funded from the Swedish government. The overall approach combines two evidence streams: (i) a nationally representative consumer survey, and (ii) key informant interviews with company executives in sectors that directly affect consumers and the environment. Together, these components aim to support practical policy making and market recommendations.

Unlike wealthier European markets where sustainability can more often be expressed as a values-led lifestyle choice, Albania's pathway remains strongly shaped by everyday pragmatism. Many behaviours aligned with circularity—saving resources, reducing waste, extending product life—are already common in households. However, motivations are frequently linked to cost and safety. This study therefore moves beyond surface attitudes to explore how affordability, trust, and system readiness shape willingness to adopt and pay for greener options.

B. Context for Interpreting the Findings

The survey was conducted in autumn 2025 in a setting marked by ongoing institutional reforms, sustained economic pressures, and public debates around safety and waste management. Four contextual areas are particularly relevant for interpreting the findings.

EU Accession and Governance Credibility

EU accession is a key driver behind the growing prominence of sustainability in Albania. As the country aligns its legal and institutional framework with EU standards and the Green Agenda for the Western Balkans, policymakers and institutions are increasingly prioritizing sustainability-related reforms.

However, the majority of people do not yet notice this change in their daily lives. Many consumers are unaware of forthcoming regulations and the majority do not yet perceive obvious changes in labels, restrictions, or services. This contributes to the explanation of the survey's low level of public understanding of concepts such as official sustainability labels, carbon footprints, and circular economy.

The European Commission’s 2025 Progress Report¹ noted limited progress in Chapter 27 (Environment and climate change), linked to weak capacity and investment, and raises concerns about greenwashing risks in protected areas. A major legal step was the adoption of Law No. 104/2024² on organic production, labelling and control, aligned with EU Regulation 2018/848 (published in Official Gazette, 2024). However, the law depends on secondary legislation expected during 2025–2027. Until these rules are fully in place and enforced, many consumers are unlikely to feel or understand the change.

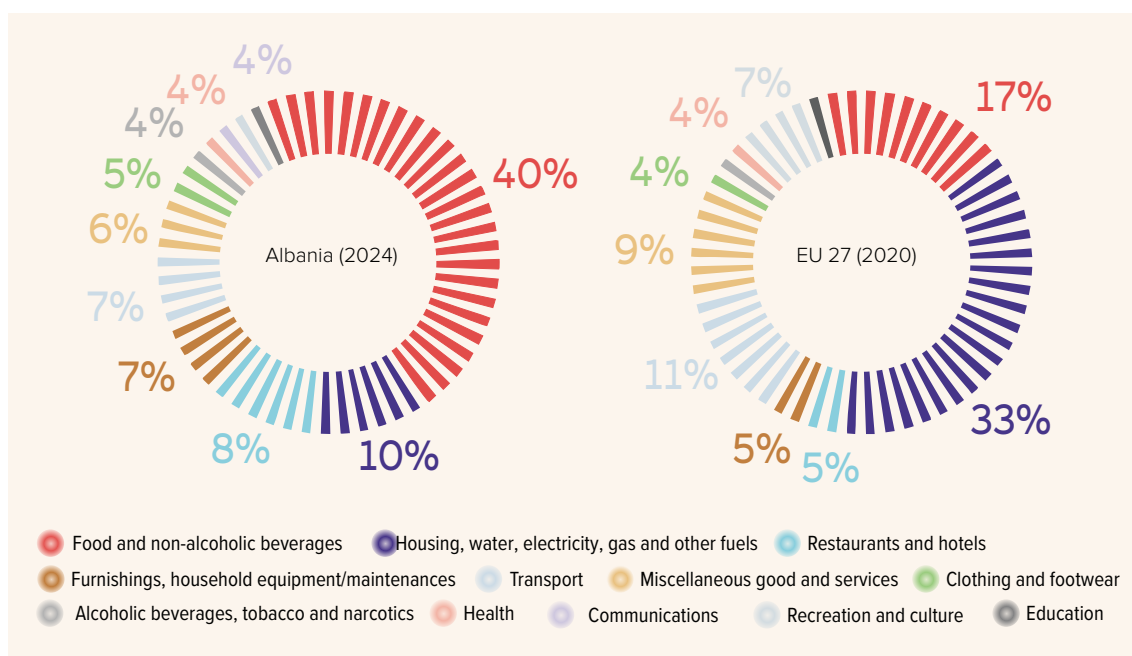
The Economic Barrier: European Prices, Local Incomes

Sustainable consumption in Albania needs to be read through the reality of household budget constraints. Eurostat³ data of 2024 indicate that food prices in Albania have reached, and in some cases exceeded, the EU average. This means many families face “European” prices with lower local incomes.

Household budget data reflects this pressure. In 2024, Albanian households spent **around 40%** of total expenditure on food and non-alcoholic beverages (INSTAT 2025). By comparison, the EU average is closer to **17%**. This difference leaves Albanian families with less flexibility for additional costs, including price premiums linked to greener products.

In this setting, paying extra for sustainability is difficult for many consumers. Sustainable options are more likely to be accepted when they clearly support **family health** or **household savings** (for example, safer food or lower energy bills), rather than adding another cost.

FIGURE 1. STRUCTURE OF CONSUMPTION EXPENDITURES: ALBANIA VS EU



Source: Instat, Household budget survey, 2024
Eurostat, Household Budget survey statistics on consumption expenditure

1. Albania Progress Report 2025, https://enlargement.ec.europa.eu/document/download/fe9138b7-90fe-4277-a12c-3a03f6d1957f_en?filename=albania-report-2025.pdf
 2. Law No 104/2024 - Për prodhimin organik, etiketimin e produkteve organike dhe kontrollin e tyre <https://qbz.gov.al/eli/ligj/2024/09/19/104>
 3. Eurostat: Comparative price levels for food, beverages and tobacco <https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/2376.pdf>

Food Safety Incidents

This study took place during a sensitive period for consumer confidence in Albania. During 2024 and 2025, public reporting and EU food safety alerts highlighted three types of cases that affected how consumers viewed labels, certificates, and retail controls.

Export rejections of Albanian produce

European food safety systems (RASFF) and media reports referred to repeated cases where Albanian agricultural products were stopped or rejected abroad due to pesticide residues or other hazards. Reported examples included:

- **Tomatoes⁴** rejected in **Croatia**, with **chlorfenapyr** detected at around **five times the permitted limit**.
- **Peppers⁵** withdrawn from markets in **Slovenia**, with **formetanate** detected at **0.076 mg/kg** against a reported limit of **0.01 mg/kg**.
- **Clementines⁶** linked to **chlorpyrifos** detections (reported at **0.029 mg/kg**) and border rejection.
- **Peaches⁷** linked to concerns about excessive **nickel (heavy metal)** and import blocks in neighbouring countries.

TABLE 1. SUMMARY OF KEY 2024–2025 FOOD SAFETY INCIDENTS

| Product | Hazard Identified | Level Detected | Action Taken | Notifying Country |
|-------------|----------------------|--------------------------|-----------------------|-------------------|
| Tomatoes | Chlorfenapyr | 5x Permitted Limit | Destruction / Arrests | Croatia |
| Peppers | Formetanate | 0.076 mg/kg (Limit 0.01) | Market Withdrawal | Slovenia |
| Clementines | Chlorpyrifos | 0.029 mg/kg | Border Rejection | Croatia |
| Peaches | Nickel (Heavy Metal) | Excessive | Import Block | Croatia |

Source: **RASFF Window** | Full list of alerts can be found [here](#)

Domestic expiration-date fraud

In mid-2025, public reporting referenced a domestic case involving alleged collection of expired packaged products from markets in Tirana and Durrës, followed by removal of original expiry dates, printing of new dates, and resale. The case was associated with a warehouse in Vora and reportedly involved items such as croissants, dried goods, and beverages (Euronews Albania, 2025; BalkanWeb, 2025; Shqiptarja.com, 2025⁸).

4. <https://webgate.ec.europa.eu/rasff-window/screen/notification/694743>

5. <https://webgate.ec.europa.eu/rasff-window/screen/notification/771029>

6. <https://webgate.ec.europa.eu/rasff-window/screen/notification/734086>

7. <https://webgate.ec.europa.eu/rasff-window/screen/notification/785030>

8. Scandal in Vora! Collecting expired products in a warehouse, falsifying expiration dates (<https://www.youtube.com/watch?v=VhYt7byOqI>) Releasing expired food onto the market, “Master AL” partner prosecuted (<https://www.balkanweb.com/hidhte-ne-treg-ushqime-te-skaduar-procedohet-penalisht-dhe-ortaku-i-master-al-skifter-tagani-pronar-edhe-i-nje-kompanie-qe-prodhon-cokollata-e-biskota/>) Food fraud network in Vora destroyed, product expiration dates were falsified (<https://shqiptarja.com/lajm/zbulohet-magazina-ku-falsifikoheshin-etiketate-e-produkteve-ushqimore-2-te-arrestuar-2-nen-hetim>)

Concerns about unsafe imports

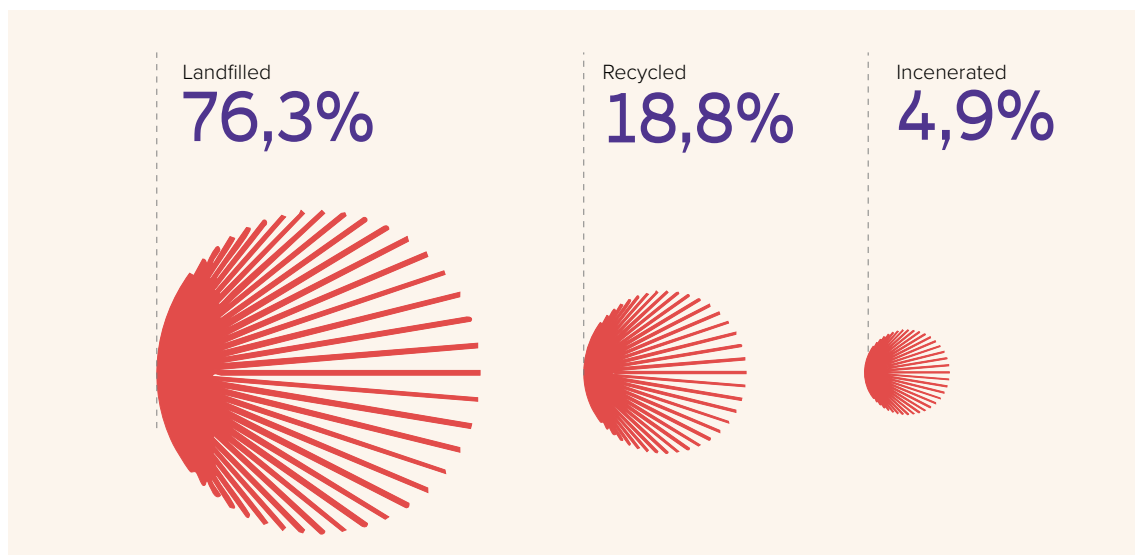
Public reporting also referenced incidents where **imported frozen chicken** entered the market before safety checks were fully completed, with later reporting of **Salmonella-related concerns** after distribution had already begun. This specific case involved approximately 13–15 tons of Brazilian chicken fillets distributed by the entity “AMG Food” (trading as “Di Mal”), which were later confirmed to contain *Salmonella Typhimurium* (Top Channel, 2025; Albanian Daily News, 2025⁹).

These events formed an important part of the environment in which consumers answered survey questions about food safety, trust in labels and sales channels, and willingness to pay for greener products.

Waste Management and the Incinerators Scandal

To understand consumer attitudes toward recycling and waste fees, it is useful to consider the waste management system in Albania in 2025. The system remains strictly limited to “collection and dumping,” with almost no functioning mechanism for separation at the source.

FIGURE 2. WASTE TREATMENTS SHARE



Source: INSTAT, Urban Solid Waste 2024

In 2024¹⁰ Albania generated about 360 kg of waste per person. Most waste was landfilled (~76.3%), while recycling remained low (~18.8%). This recycling share is driven largely by **industry and informal waste pickers**, rather than by a stable national household separation system. In many places, separated bins are limited or collection does not consistently support sorting.

9. Imported chicken fillets with salmonella, company administrator declared wanted, three AKU inspectors prosecuted (<https://top-channel.tv/2025/03/29/importuan-fileto-pule-me-salmonele-shpallet-ne-kerkim-administratori-i-kompanise-procedohen-tre-inspektore-te-aku/>) Chicken Fillet with Salmonella Blocked in Albania, 13 Tones Suspected Sold in the Market (<https://albaniadailynews.com/news/chicken-fillet-with-salmonella-blocked-in-albania-13-tones-suspected-sold-in-the-market>)

10. INSTAT, Urban Solid Waste, 2024 <https://www.instat.gov.al/media/h4iefy5h/urban-solid-waste-2024.pdf>

The Incinerator Scandal. In Tirana and some other major cities, earlier pilot projects to encourage recycling failed to scale. Instead, public policy shifted toward large-scale incineration contracts. During 2023 and 2024, the “Incinerator scandal” became a dominant public issue. High-profile investigations and corruption cases linked to these facilities revealed that millions of euros were spent on plants that were either non-functional or subject to significant controversy. During 2023 and 2024, the “Incinerator scandal” became a dominant public issue. High-profile investigations and corruption cases linked to these facilities revealed that millions of euros were spent on plants that were either non-functional or subject to significant controversy (BIRN, 2023¹¹; Balkaninsight¹², 2024).

In this setting, households may report willingness to separate waste, but remain cautious about paying higher fees unless they see clear, trusted improvements in separated collection and real recycling outcomes.

Implications for the Study

This background information helps explain three patterns that appear throughout the report findings.

1. **Sustainability as resilience.** Many sustainability-related behaviours in Albania are linked to household resilience—saving money and reducing risk—before they are linked to environmental values.
2. **Trust as a key mediator.** Trust in claims, labels and enforcement mechanisms strongly shape how consumers respond to certifications and whether they are willing to pay for ‘greener’ options.
3. **System matters for behaviour.** In areas such as waste management, the availability of service options and system credibility strongly influence whether stated willingness can translate into real behaviour.

C. Study Scope and Survey Design

This study explores sustainable consumption practices among **urban consumers in Albania**, with a focus on everyday purchasing behaviour, food safety perceptions, waste practices and trust in market actors. It supports UNDP Albania’s Business4SDGs project and provides evidence relevant to SDG 12 (Responsible Consumption and Production).

The survey aimed to:

- (i) Assess consumer awareness and understanding of sustainability-related concepts and claims;
- (ii) Analyse purchasing drivers and trust factors across key product categories (fresh food, packaged food and detergents);
- (iii) Assess willingness to pay for greener products and improved waste services; and
- (iv) Identify practical barriers and enabling conditions for scaling sustainable consumption.

11. Incinerators “burned” 103 million euros by June 2023 / Parent company receives 2 million euros for services to water suppliers (<https://www.balkanweb.com/en/incinerators-burn-103-million-euros-until-june-2023--the-parent-company-receives-2-million-euros-for-services-to-the-water-supply/>)

12. Albania’s ‘Incinerator Affair’: A localized History of Waste and Graft (<https://balkaninsight.com/2023/12/14/albanias-incinerator-affair-a-localized-history-of-waste-and-graft/>)

Data were collected through a quantitative face-to-face survey that is nationally representative of Albania's urban adult population (18+). A total of 1,000 interviews were completed using a stratified random sampling design, with fieldwork conducted in October 2025 using Computer-Assisted Personal Interviewing (CAPI).

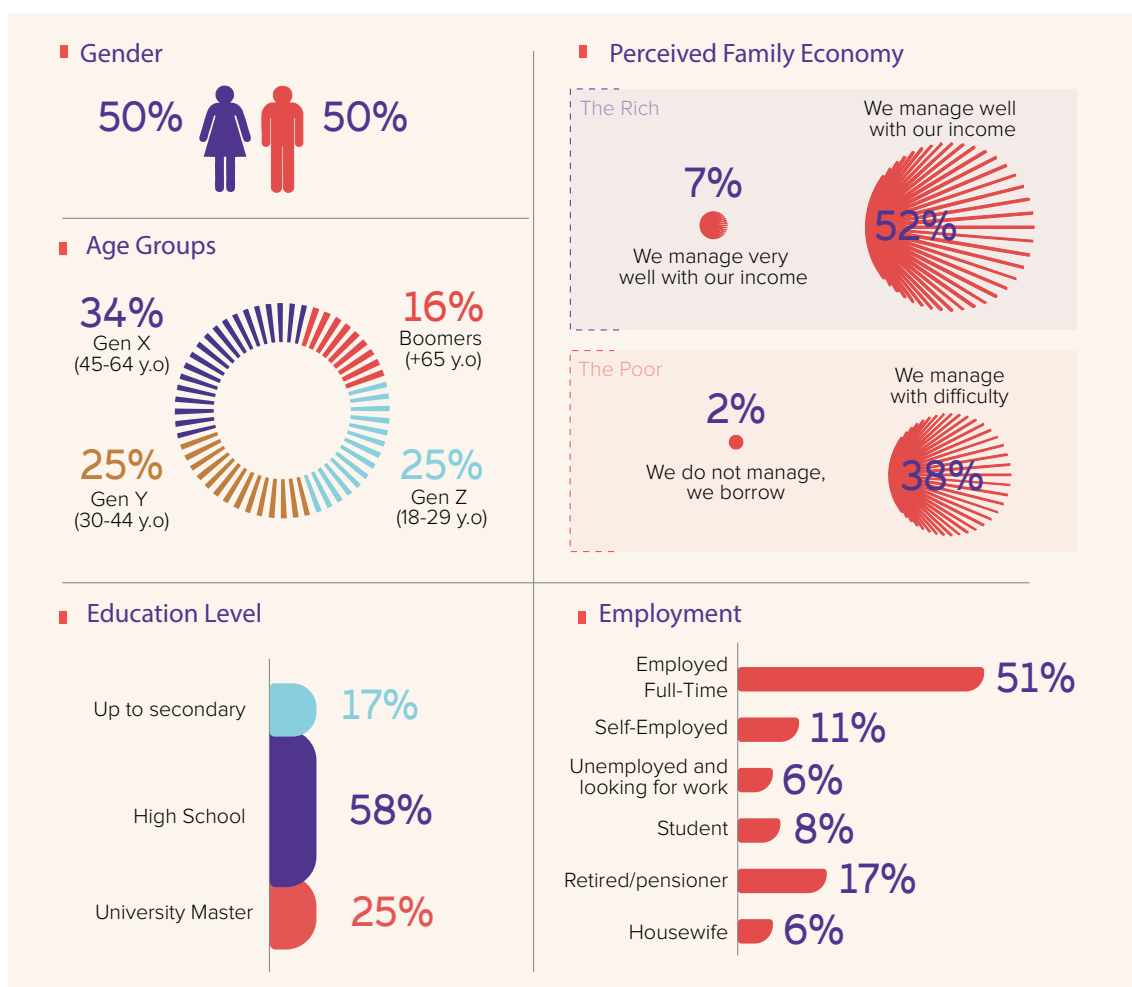
A full description of the sampling frame and selection procedures is provided in **Annex A**.

Sample description

The survey covers 1,000 adults living in urban areas across Albania. Men and women are almost equally represented. The age structure is well balanced: around one quarter are young adults, about one third are in the 35–44 range, another quarter are 45–54, and roughly one in six are 55+. In terms of education, about 17% have completed primary or lower-secondary education, around 58% have completed upper-secondary or vocational school, and roughly one quarter hold a university degree or higher.

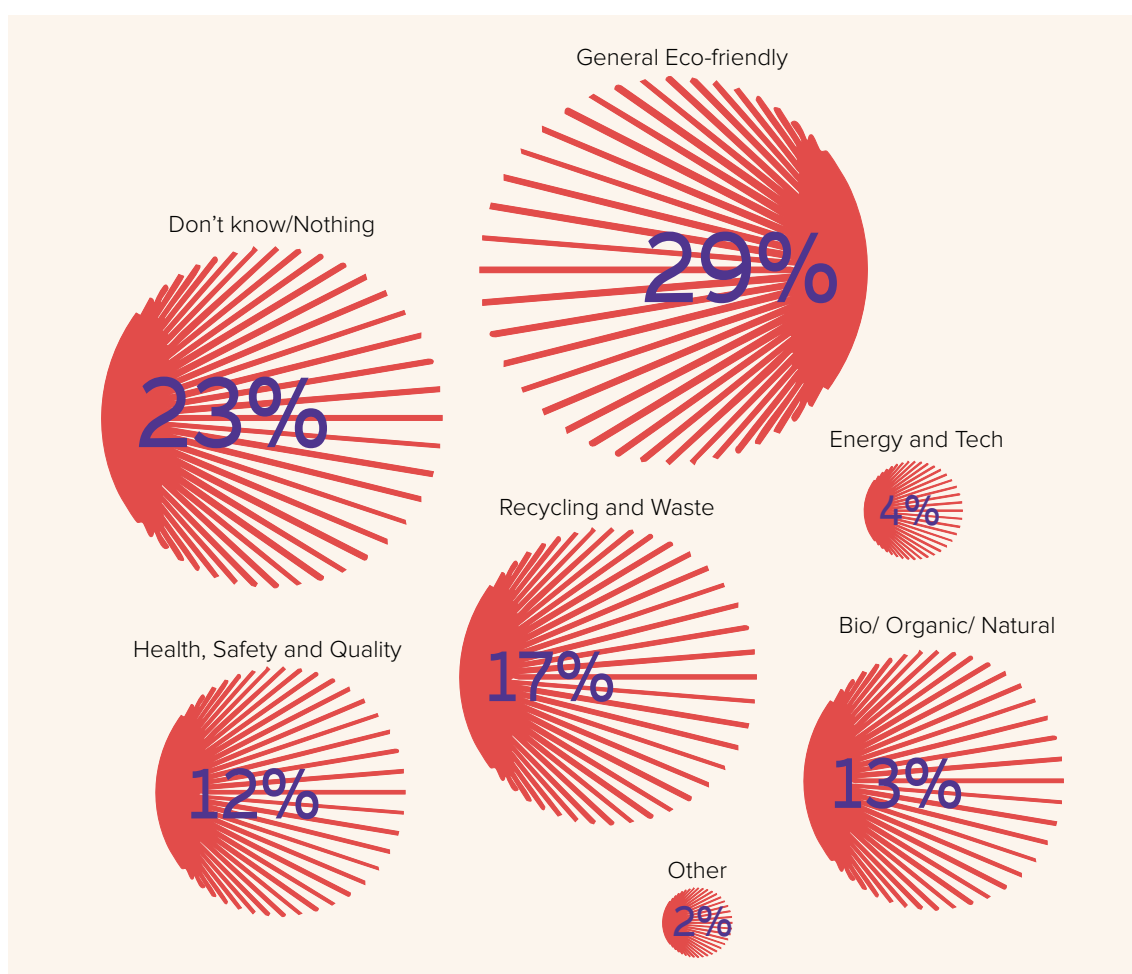
The employment picture is also diverse. Just over half of respondents (51%) are employed full time, 11% are self-employed, and smaller shares are unemployed (6%), students (8%), retired or pensioners (17%) and housewives (6%). When asked about their family economy situation, 7% say they manage very well with their income, 52% say they manage well, 38% manage with difficulty, and 2% report that they do not manage and need to borrow.

FIGURE 3. SAMPLE DESCRIPTION



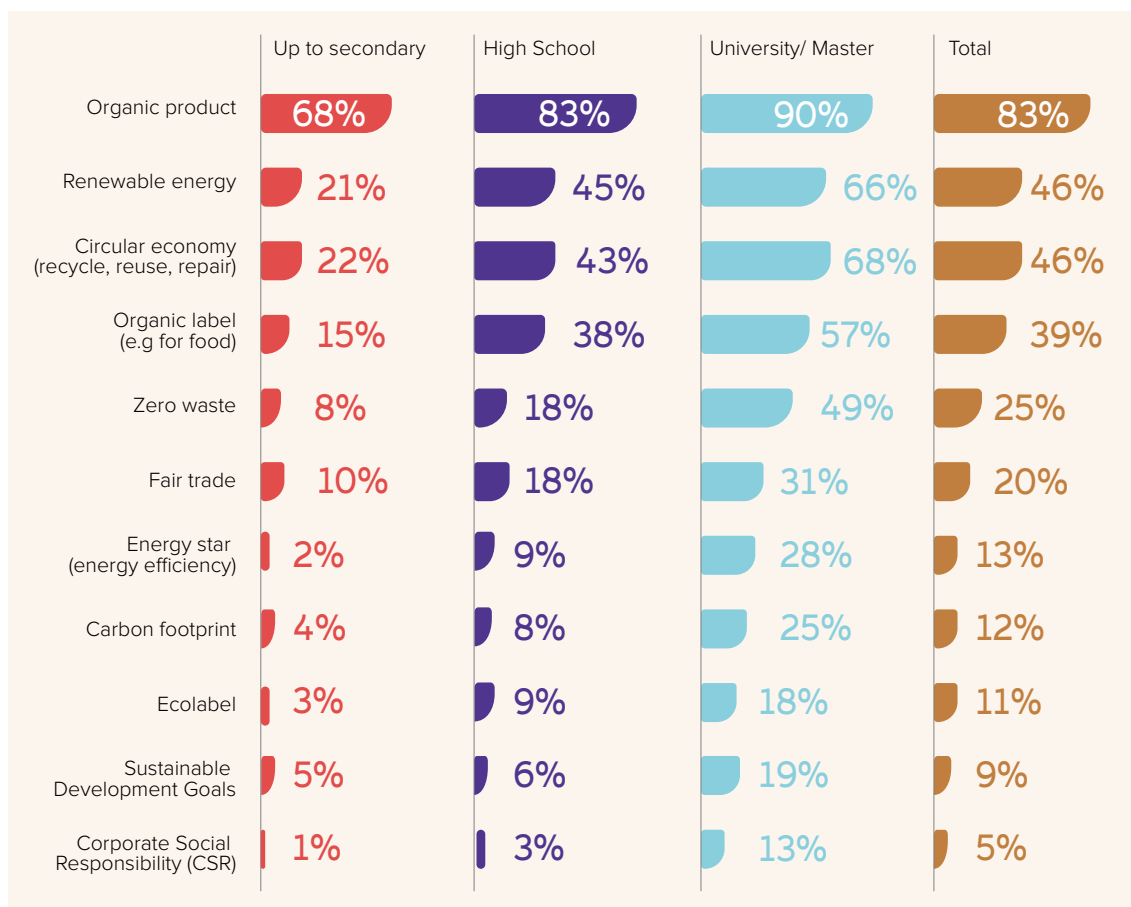
To understand how Albanian consumers perceive sustainability, respondents were first asked an open-ended question: what comes to mind when you hear the term “environmentally friendly product?” As shown in Figure 4, the concept is present in public consciousness, but it is not yet clearly defined for many. The most common response is a general, non-specific idea of being “eco-friendly” (29%). When respondents provide more concrete meanings, they tend to focus on practical, everyday cues rather than broader environmental goals: 17% associate the term with recycling and waste reduction, 13% with bio/ organic/ natural products, and 12% with health, safety and quality. At the same time, a sizeable share (23%) cannot provide any association and answer “don’t know.” This uncertainty is not evenly distributed: it is much higher among older and less-educated groups—for example, 41% of 65+ years old and 52% of those with up to secondary education have no association, compared with 9% of university graduates.

FIGURE 5. WHAT “ENVIRONMENTALLY FRIENDLY PRODUCT” MEANS TO PEOPLE



The survey then tested recognition of specific sustainability terms to assess how deep this knowledge extends. Figure 5 confirms that awareness is selective and strongly shaped by education. Terms that are concrete and visible in daily life have high recognition—most notably “organic product” (83%). Recognition is moderate for “renewable energy” and “circular economy” (both around 46%), while more technical or institutional concepts used in policy remain largely unfamiliar, including “carbon footprint” (12%), “ecolabel” (11%) and the SDGs (9%). The education gradient is steep: for instance, recognition of “circular economy” rises from 22% among those with up to secondary education to 68% among university graduates.

FIGURE 6. LEVEL OF AWARENESS WITH SUSTAINABILITY TERMS BY EDUCATION



These results suggest an awareness profile that is **practical rather than technical**. For many consumers, “environmentally friendly” is interpreted through a **protection mindset**—linked to cleanliness, avoiding harmful substances, and reducing visible waste—more than through abstract climate concepts or institutional terminology. This has direct implications for communication: sustainability messages and labels are likely to work best when anchored in **familiar, trusted cues** (safe, clean, verified, less waste) and only then connected to broader sustainability narratives.

Sustainable Behavioural Profile: Five Pillars of Sustainable Consumption

To summarise a wide set of survey statements into what can be interpreted as sustainable behavioural, the analysis groups responses into five behavioural indices: Rational Consumption, Product Circularity, Informed Choice, Waste Avoidance, and Resource Efficiency. Respondents rated their agreement with statements describing everyday practices (1 = strongly disagree - 5 = fully agree). Items were harmonised (including reverse-coding where required) and standardised to a 0–100 scale, where higher values indicate stronger endorsement of sustainability-compatible behaviours.

Full item lists and scoring methods are provided in **Annex C**.

FIGURE 7. FIVE BEHAVIOURAL INDICES OF SUSTAINABLE CONSUMPTION



How to read the indices

Index values range from 0 to 100 and should be interpreted as **relative strength of behavioural alignment**. For reporting purposes, index scores can be interpreted using four broad bands:

👉 **0–39: Low adoption**

Behaviour is weak, inconsistent, or not yet part of routine practice.

👉 **40–59: Moderate adoption**

Some positive habits are present, but not stable or widespread.

👉 **60–79: Strong adoption**

Behaviour is relatively consistent and more embedded in daily life.

👉 **80–100: Very strong adoption**

Behaviour appears highly established and habitual.

Differences across pillars help identify where sustainability already fits naturally into daily life and where adoption is constrained.

Analysis

The sections below examine each behavioural dimension separately, using the index score as the main summary measure and drawing on the underlying items to clarify what drives the pattern across socio-demographic groups. Only statistically significant differences are reported in the main text.

The full list of indices and component items is provided in **Annex D**.

#1 Rational Consumption

Green by necessity

The Rational Consumption Index captures agreement with three reversed trend-oriented statements (buying the latest fashion, buying the newest electronics, and wanting friends to see one's latest trends). Higher values therefore reflect more careful, needs-based consumption.

Overall, rational consumption is relatively high (mean 71; median 75), indicating that limiting trend-driven purchases is common in the population.

FIGURE 8. RATIONAL CONSUMPTION INDEX AND SUBITEM

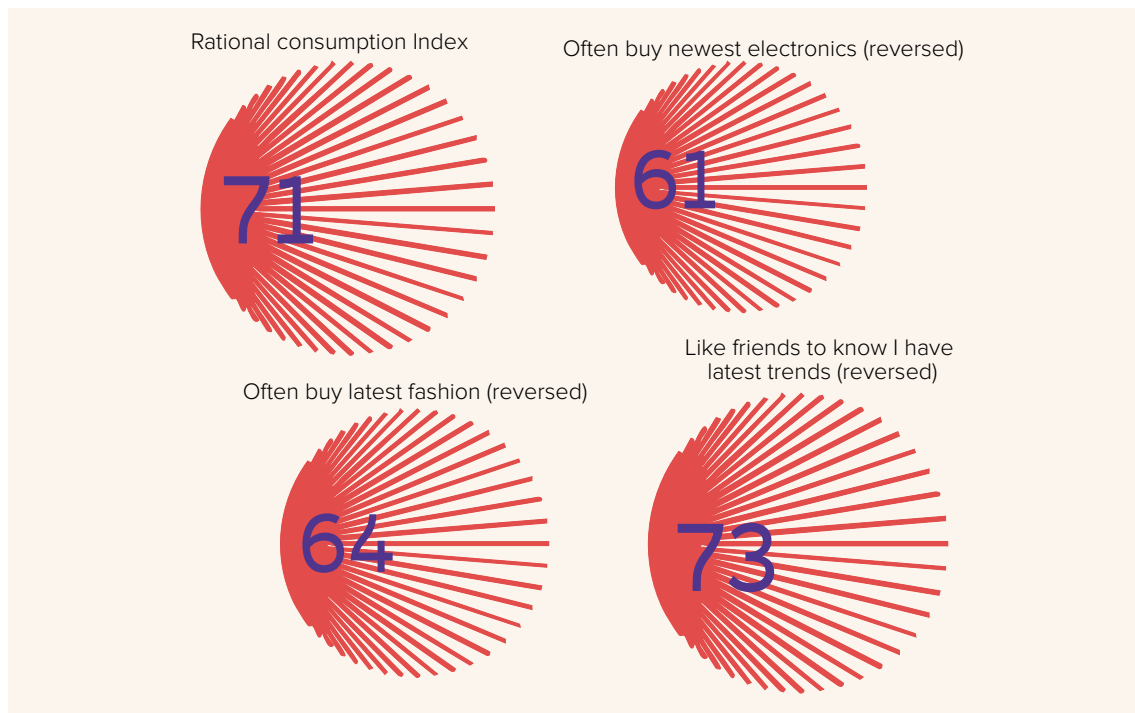
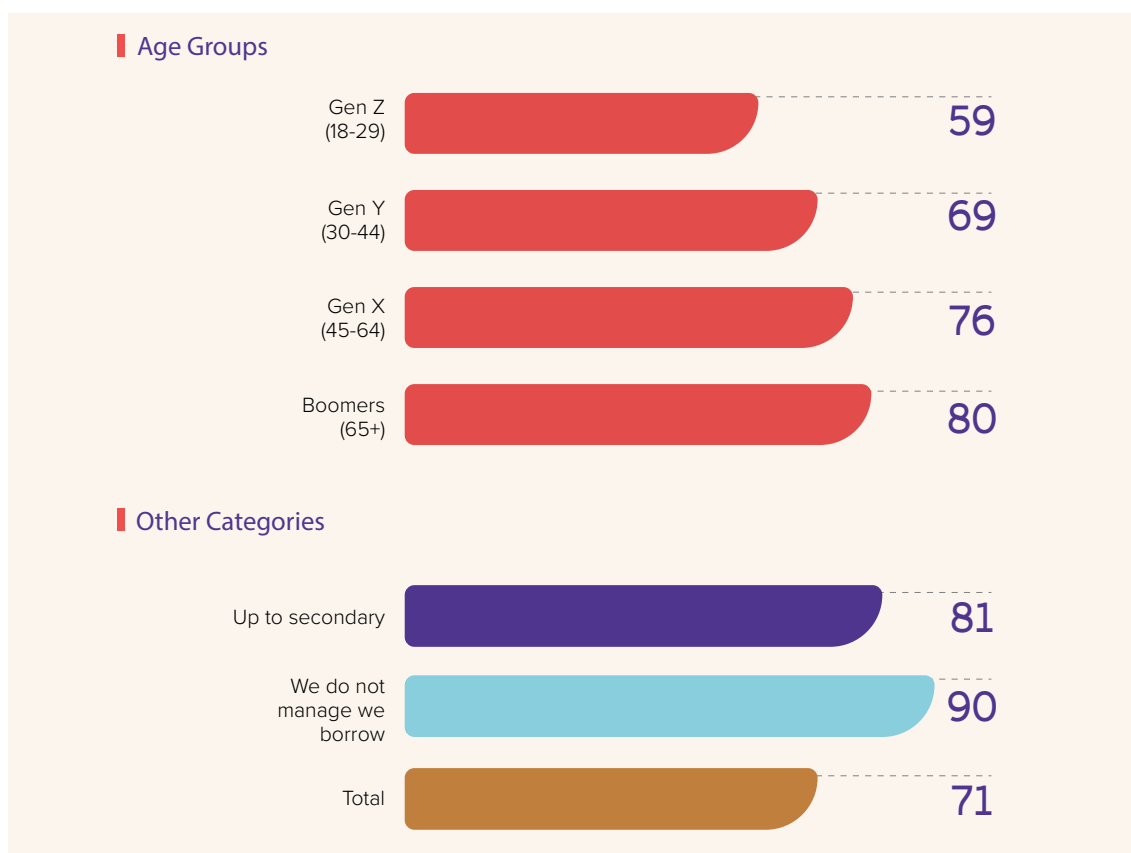


Figure 8 shows a clear generational gradient. Scores increase steadily from Gen Z (59) to Gen Y (69), Gen X (76.5) and Boomers (80). The same direction is visible in each component item: agreement with not buying the latest fashion rises from 45 in Gen Z to 77 among Boomers, and the “status signalling” item (reversed) increases from 61 in Gen Z to 83 among Boomers. This indicates that younger cohorts are more exposed to trends and social signalling in consumption, while older cohorts are more likely to report careful purchasing.

FIGURE 9. RATIONAL CONSUMPTION INDEX BY AGE GROUPS AND OTHER SELECTED CATEGORIES



However, the strongest differences are linked to **financial situation**. Rational consumption rises sharply across the self-reported household economic scale: 63 among respondents who say their household “manages very well,” 67 among those who “manage well,” 76 among those who “manage with difficulty,” and 89 among those who say their household “does not manage / borrows.” The evidence therefore suggests that careful consumption is, to a large extent, necessity-led, rather than a voluntary sustainability lifestyle.

Differences by **education** reinforce this reading. Respondents with education up to secondary level score higher (81) than university/ master graduates (68). This indicates that rational consumption is not concentrated among the most educated groups, but is stronger where resource constraints and practical budgeting discipline are more common.

These findings align with Albania’s household budget reality: in 2024, households spent around 40% of total expenditure on food and non-alcoholic beverages, compared with about 17% in the EU average (see [The Economic Barrier: European Prices, Local Incomes](#)). With such a large share absorbed by basic needs, many families have limited space for extra spending, which helps explain why rational consumption peaks among financially strained respondents.

Overall, rational consumption is widespread in Albania, but it is unevenly distributed. It is highest among older cohorts and among respondents reporting financial difficulty—supporting the interpretation that much of this behaviour reflects economic pressure and budgeting habits, rather than a distinct “green consumer” identity.

#2 Product circularity index

Fix, Reuse, Keep: An Aging Sustainability Skill

The Product Circularity Index captures agreement with behaviours that keep products in use for longer: keeping items for a long time, repairing before replacing, reusing/recycling unwanted items, and buying second-hand. Overall, the index is moderate to strong (**mean 66.9**), but its internal structure shows that circularity in Albania is built more on **longevity and repair** than on a strong second-hand culture.

Looking first at the component items, **keeping things for a long time** is the most widely endorsed practice (**85 overall**), followed by **repair before replace (70)**. **Reuse/ recycling** is lower (**60**), and **buying second-hand** is the weakest component (**53**). This suggests that many respondents support “make it last” behaviours within the household (“keep and fix”), while fewer extend circularity into market behaviours such as purchasing used goods.

FIGURE 10. PRODUCT CIRCULARITY INDEX AND SUBITEMS

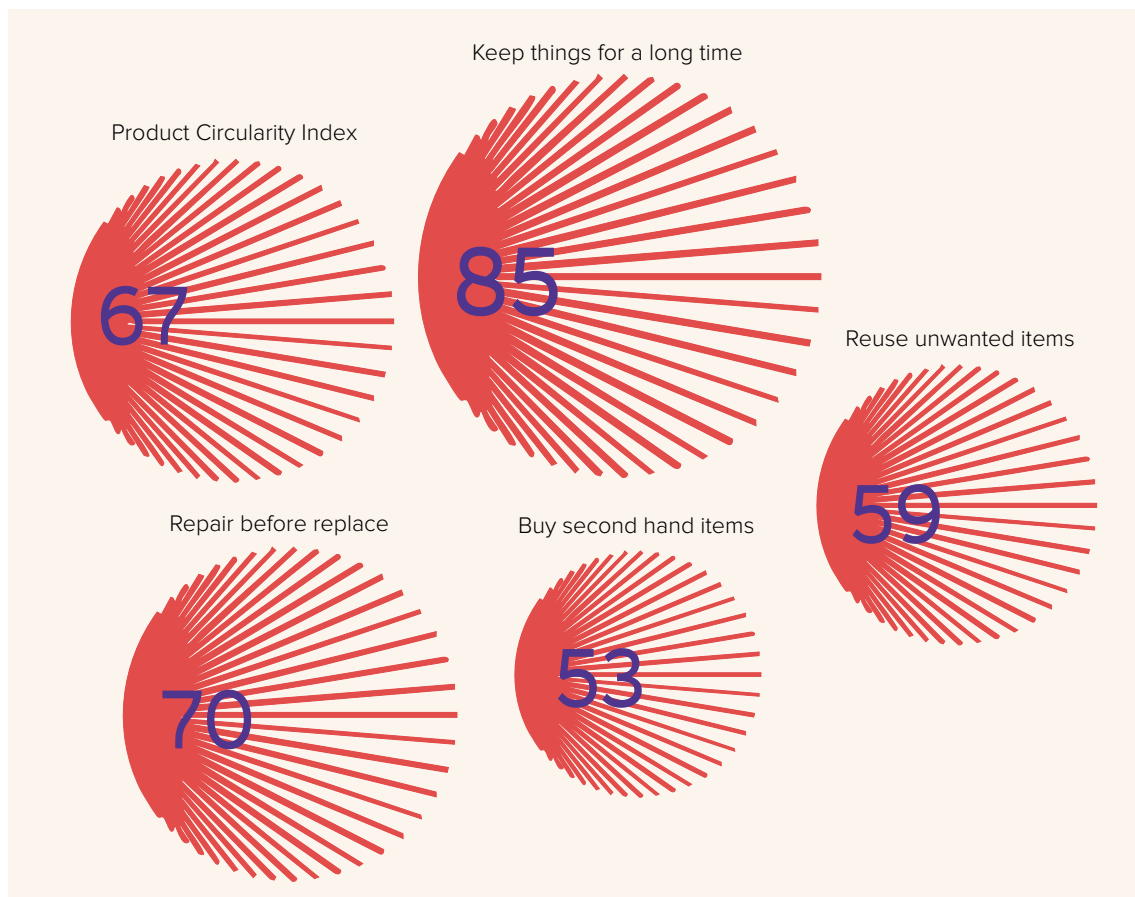
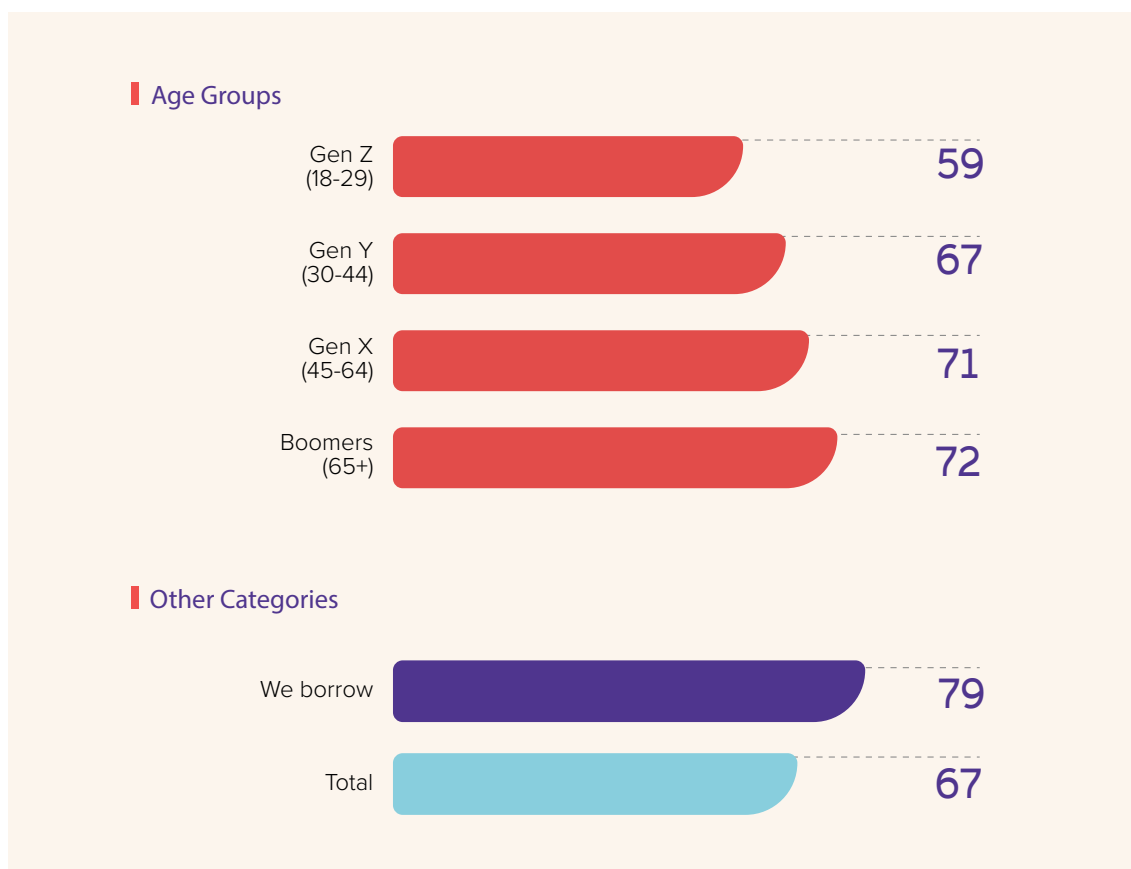


FIGURE 11. PRODUCT CIRCULARITY INDEX BY AGE GROUPS AND OTHER SELECTED CATEGORIES



Against this profile, Figure 10 shows a clear **generational gradient**. The overall index rises from **Gen Z (58.6)** to **Gen Y (67)**, **Gen X (71)** and **Baby boomers (72)**. The same direction is visible across all components. For example, longevity increases from **78** in Gen Z to **90** among Boomers, while repair shows the sharpest jump—from **58** in Gen Z to **77** among Boomers. Reuse/ recycling rises more moderately (**52 → ~63**), and second-hand purchasing remains comparatively low even among older cohorts (**45** in Gen Z vs **57** in Gen X/ Boomers).

This generational pattern is consistent with Albania’s economic history. Many Gen X and Boomers grew up during communism and the transition period, when goods were scarcer and household budgets were tighter, making repair and keeping items normal and necessary. Younger cohorts, by contrast have grown up in a more consumption-oriented market environment and face stronger pressures toward trends and faster replacement cycles, which is reflected in their lower scores.

Economic pressure is again a major differentiator

Education and economic situation reinforce the “necessity and habit” interpretation. Product circularity is higher among respondents with **lower education (74** up to secondary) than among those with high school or university education (both **66**). The difference is particularly visible for repair (79 vs 68–70) and second-hand purchasing (60 vs 47 among university/master).

A similar pattern emerges by self-reported household economic difficulty: from **63** among respondents who say their household “manages very well,” to **65** among those who “manage well,” **71** among those who “manage with difficulty,” and **79** among those who report their household “does not manage and borrows.” This increase is most evident in repair (**67 → 86**) and reuse/ recycling (**53 → 75**). This indicates that circularity is often reinforced by the practical need to extend product life when budgets are tight—another form of “**green by necessity.**”

Overall, the results suggest that product circularity in Albania is best understood as a household practice shaped by habit and constraint—strongest among older cohorts and those under financial pressure—rather than as a consumer trend led by higher education or lifestyle preference.

#3 Informed Choice index

The Informed Choice Index summarizes agreement with three verification behaviours: checking eco/ organic labels, checking energy labels (A+++), and buying directly from farmers to verify origin. Overall, informed choice is relatively strong (mean 73).

Among the three items, checking the energy label is the most widely endorsed (78), while checking eco/ organic labels is lower (67), suggesting that some forms of product information are easier to use than others.

FIGURE 12. INFORMED CHOICE INDEX AND SUBITEMS

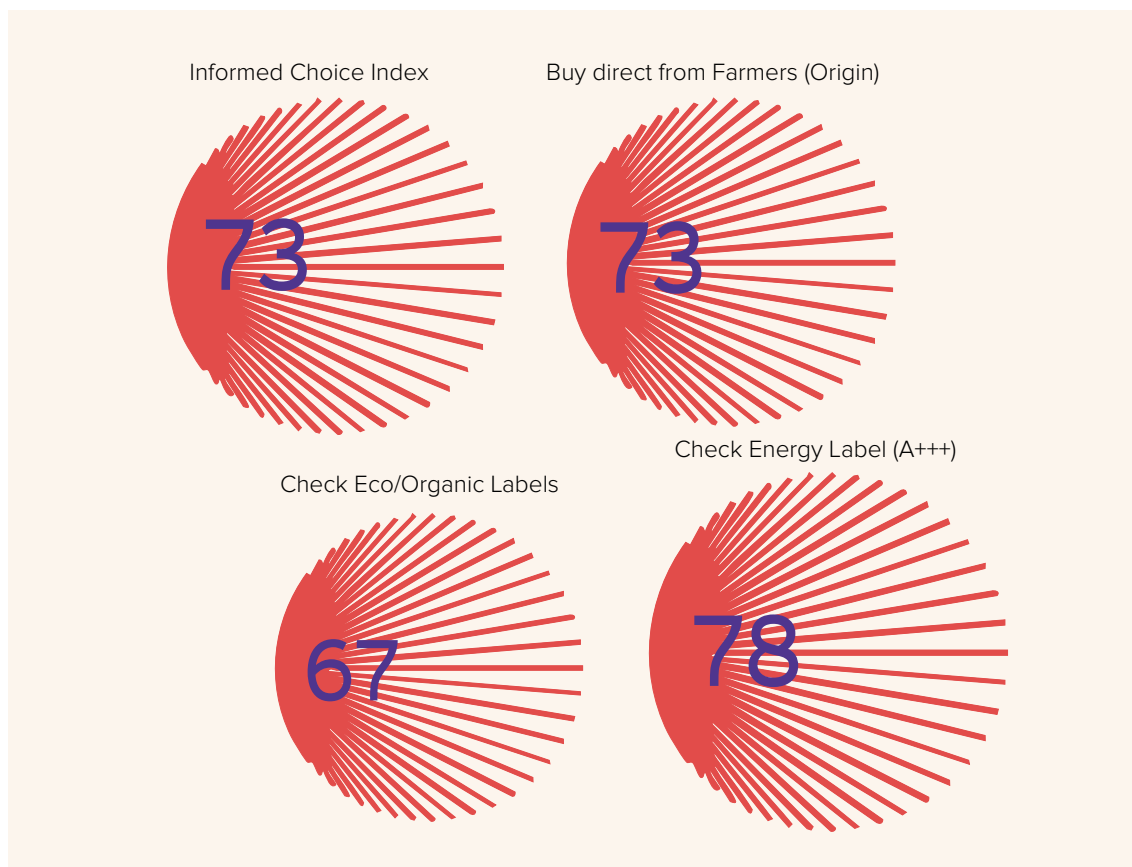
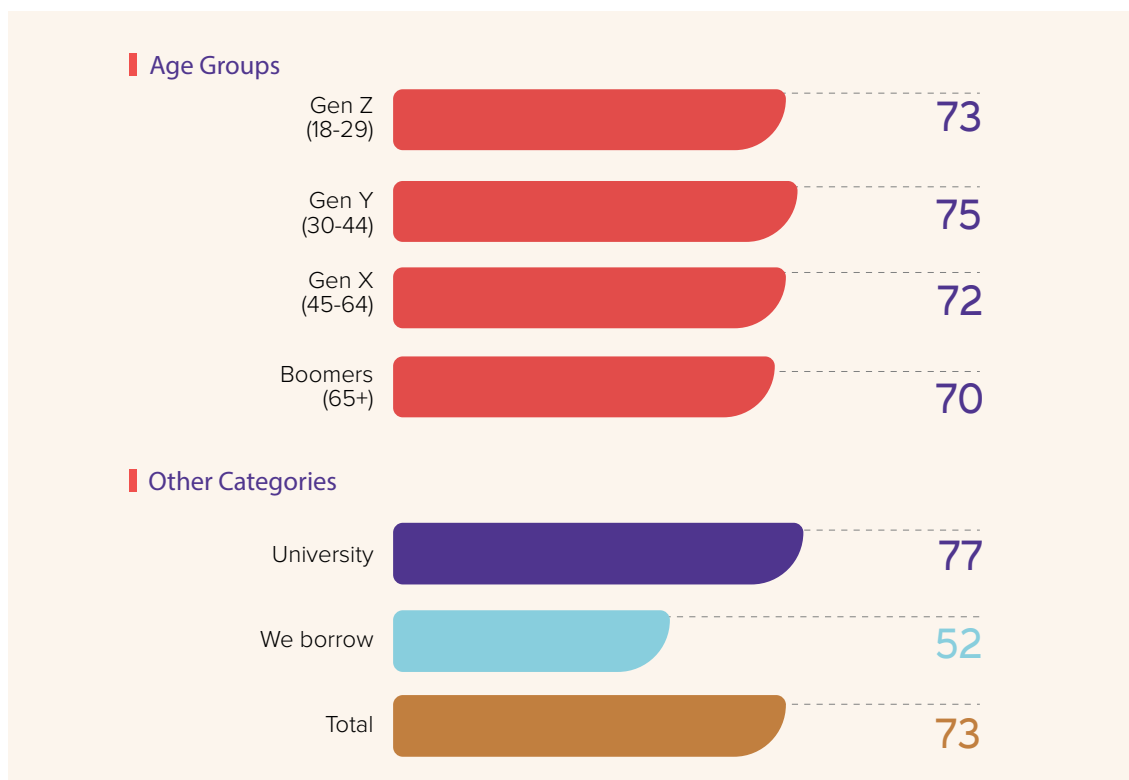


FIGURE 13. INFORMED CHOICE INDEX BY AGE GROUPS



Unlike rational consumption and circularity, **informed choice is not generational**. Scores are fairly stable across age cohorts (approximately 70–75), with only modest differences between Gen Z, Gen Y, Gen X and Boomers. This indicates that label-checking and origin verification are not behaviours that increase strongly with age in the same way as repair or purchasing restraint.

Instead, the index is shaped mainly by **education and household purchasing power**. Informed choice rises from 67 among respondents with education up to secondary level to 77 among university/ master graduates. The education gap is particularly visible for checking eco/ organic labels (57 vs 75) and for checking energy labels (72 vs 85). This suggests that understanding, navigating and trusting product information is more common among better educated consumers.

The strongest differences are linked to **self-reported household economic situation**. Respondents who say their household manages very well score the highest (81), followed by those who manage well (75). Scores then drop to 68 among those who manage with difficulty and fall sharply to 52 among those who say their household does not manage and needs to borrow. The pattern is especially obvious for eco/ organic labels, which fall from 77 (manage very well) to 34 (do not manage/ borrow).

This indicates that “shopping with scrutiny” requires time, attention, and realistic options at the point of purchase. When household budgets are under pressure, consumers have less room to check, compare, and act on information. Importantly, the next sections clarify that this scrutiny is mainly used to check information primarily for **safety, freshness, and reliability** (expiry date, ingredients, origin, trusted seller/ brand), while environmental claims play a **secondary** role.

#4 Waste Avoidance Index

The Waste Avoidance Index combines three everyday practices: avoiding excessive packaging, bringing one's own shopping bag, and avoiding single-use products. Overall performance is **mid-range (54/100)**, indicating that waste reduction behaviours are present, but not consistently embedded.

The component items show why the overall score remains moderate. Avoiding single-use products is relatively more common (**63**), while avoiding excessive packaging scores lower (**52**) and bringing a shopping bag is the weakest routine (**47**). In practical terms, people can decide to refuse some single-use items, but they have less control over how products are packaged, and they do not always remember—or find it easy—to bring reusable bags.

FIGURE 14. WASTE AVOIDANCE INDEX AND SUBITEMS

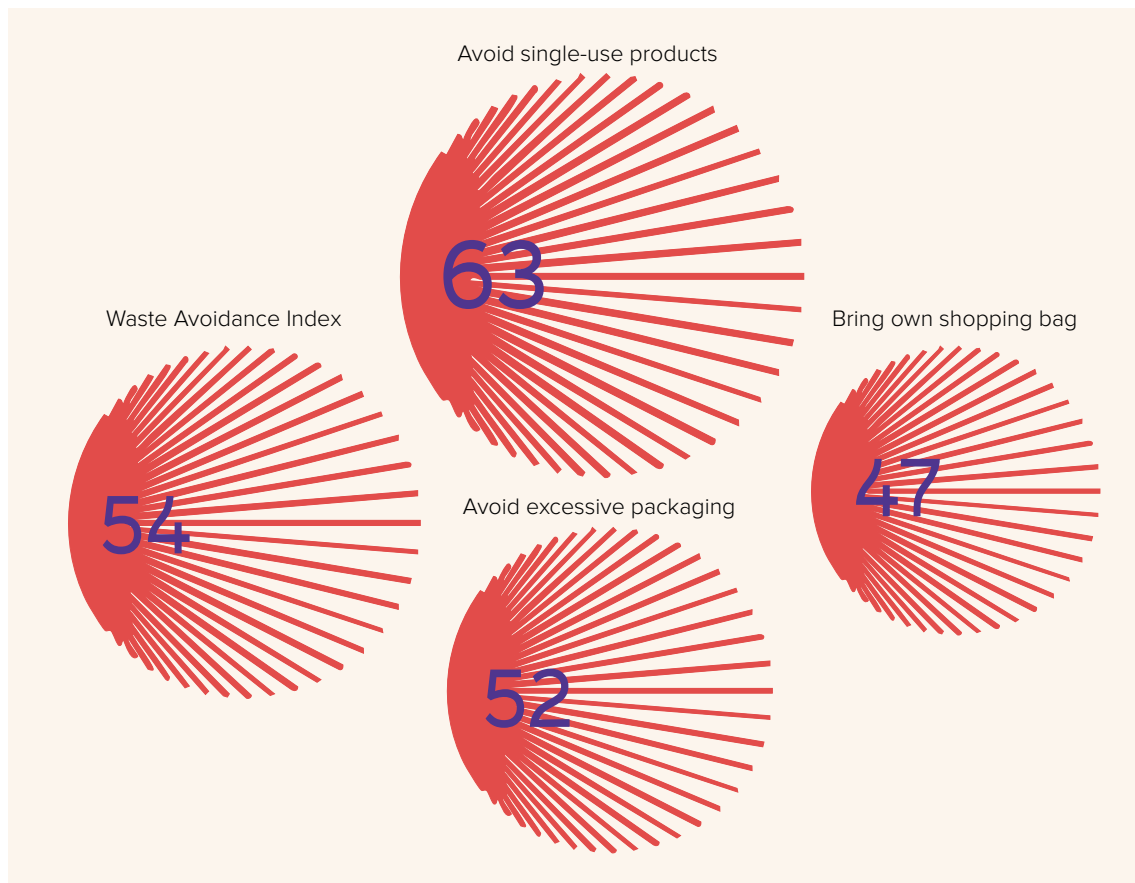
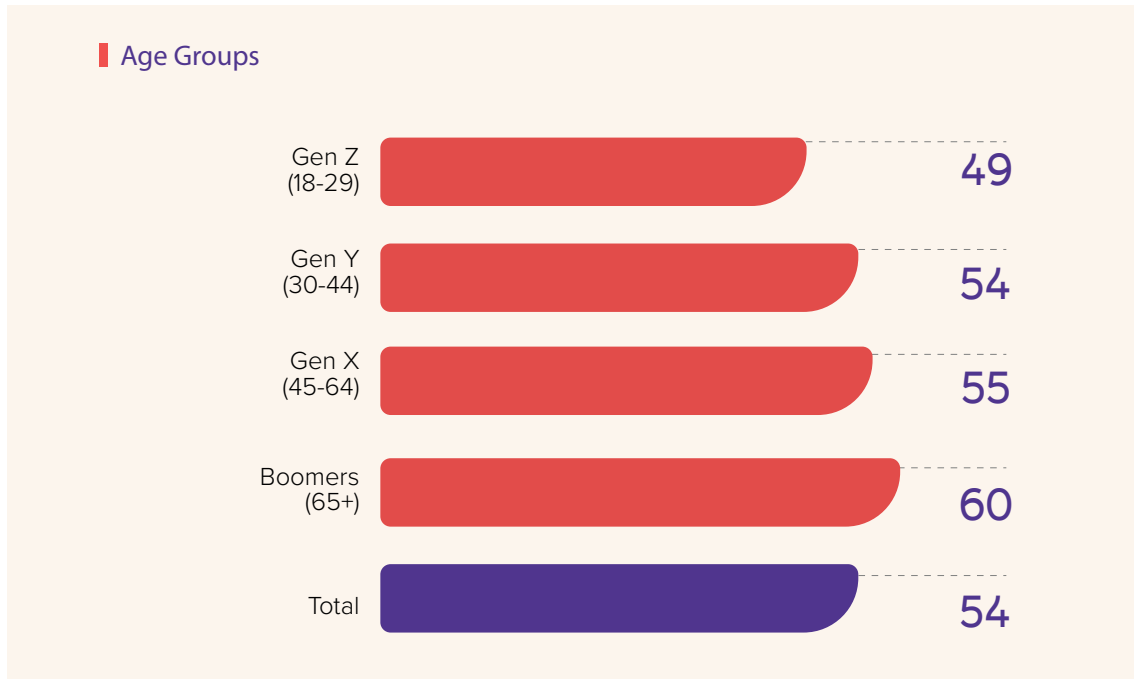


FIGURE 15. WASTE AVOIDANCE INDEX BY AGE GROUPS



Differences across age and other socio-economic groups are modest. The index rises only gradually from **Gen Z (49)** to **Boomers (60)**, meaning that even the highest-scoring cohorts perform only slightly better. There is also no clear “green by necessity” pattern: financial pressure does not push all waste behaviours in the same direction, because the actions included in the index respond to different constraints. Some actions are low-cost habits (bringing a bag), while others depend on what shops offer and what is available (packaging and single-use alternatives).

The most consistent interpretation is therefore structural. In a context with limited waste sorting and few refill/ return options, consumers can only reduce waste **at the margin**. The mid-range score is better read as a sign of **limited options and weak incentives**, rather than a lack of concern. Meaningful improvement in this pillar will depend on system changes—retail practices, packaging rules, and waste services—alongside awareness efforts.

#5 Resource efficiency Index

The Resource Efficiency Index combines three everyday practices: saving energy (managing lighting and climate control), saving water (for example, shorter showers), and using active mobility (walking or cycling). It is the strongest behavioural pillar in the study (**mean 82; median 83**), indicating that saving energy and water is already a common routine rather than a niche “green” practice.

The internal pattern of the index helps clarify what is driving the overall score. Household-based behaviours are clearly the most established: **energy saving (88)** and **water saving (86)** are very high, indicating that most respondents report actively managing utility use at home. By contrast, **walking/cycling (73)** is lower. This gap suggests that mobility choices are shaped not only by personal preference, but also by external constraints such as distance, infrastructure, and perceived safety.

FIGURE 16. RESOURCE EFFICIENCY INDEX AND SUBITEMS

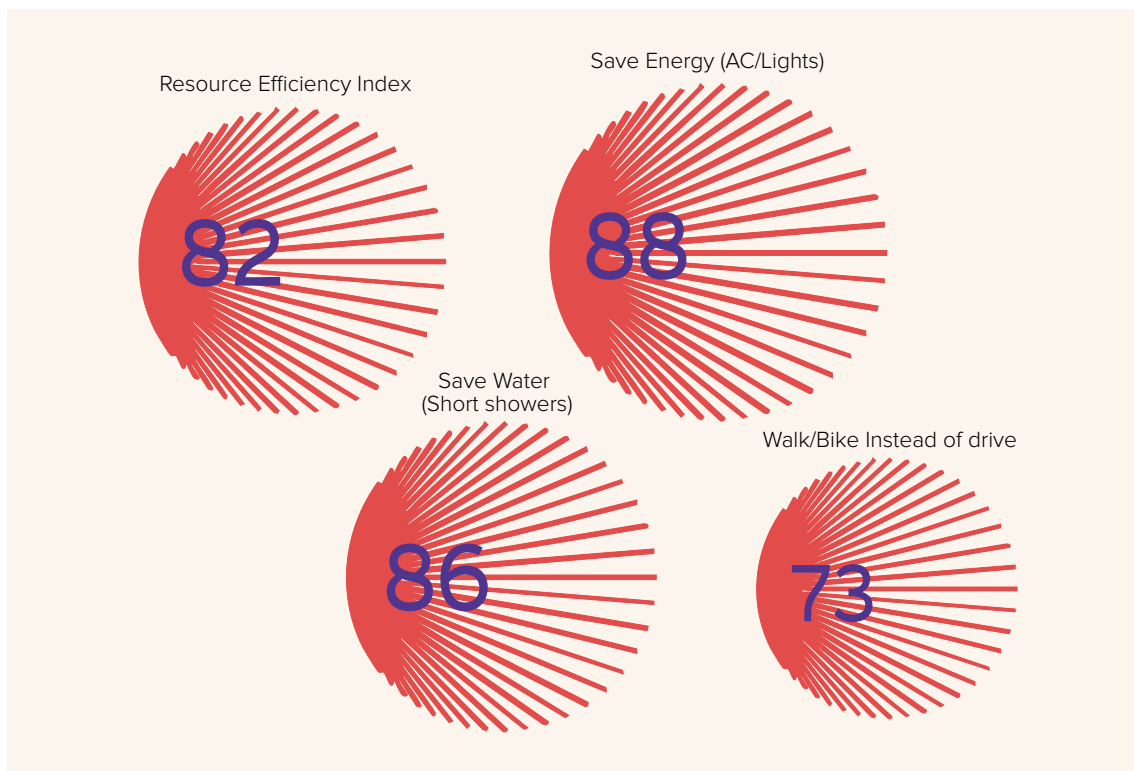


FIGURE 17. RESOURCE EFFICIENCY INDEX BY AGE GROUPS AND OTHER SELECTED CATEGORIES

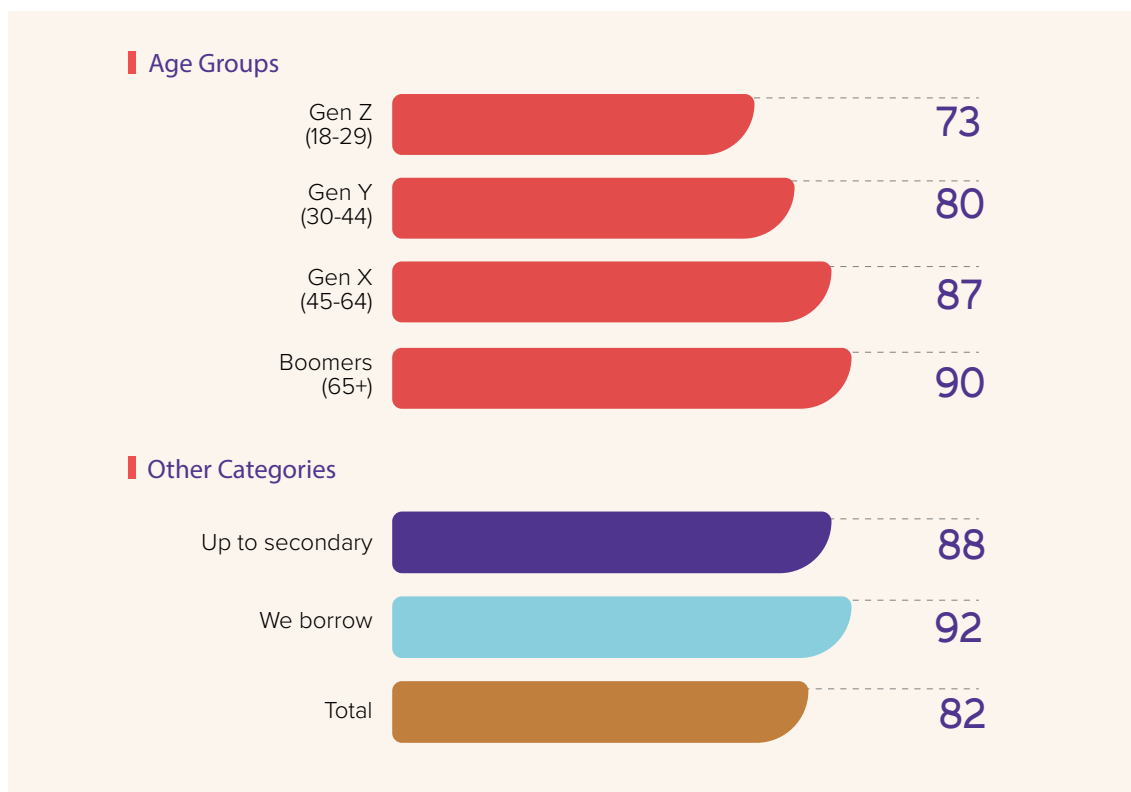


Figure 17 illustrates this clearly: even the lowest-scoring cohort, **Gen Z (73)**, reports relatively high levels of resource efficiency, while scores rise steadily across generations to **Boomers (90)**. This gradient is consistent with life-stage responsibility—when people manage a household and pay the bills, they tend to monitor energy and water use more closely.

Financial pressure further intensifies these behaviours. Respondents who describe their household economic situation as not managing and needing to borrow record the highest index values (92), suggesting that conservation operates as a practical cost-control strategy. In this sense, resource efficiency is widespread across Albanian society, but older and financially constrained groups “stretch” household resources the most — reflecting a disciplined budgeting habit as much as an environmental choice.

Education patterns reinforce the same conclusion. Resource efficiency is highest among respondents with education up to secondary level (88) and lower among university graduates (around 81). This “inversion” is consistent with the broader finding that sustainability-compatible practices in Albania often emerge through everyday budgeting habits, and not through environmental knowledge alone.

Synthesis across the five behavioural pillars

The five indices show that Albanians already practice several sustainability-compatible behaviours, but for different reasons.

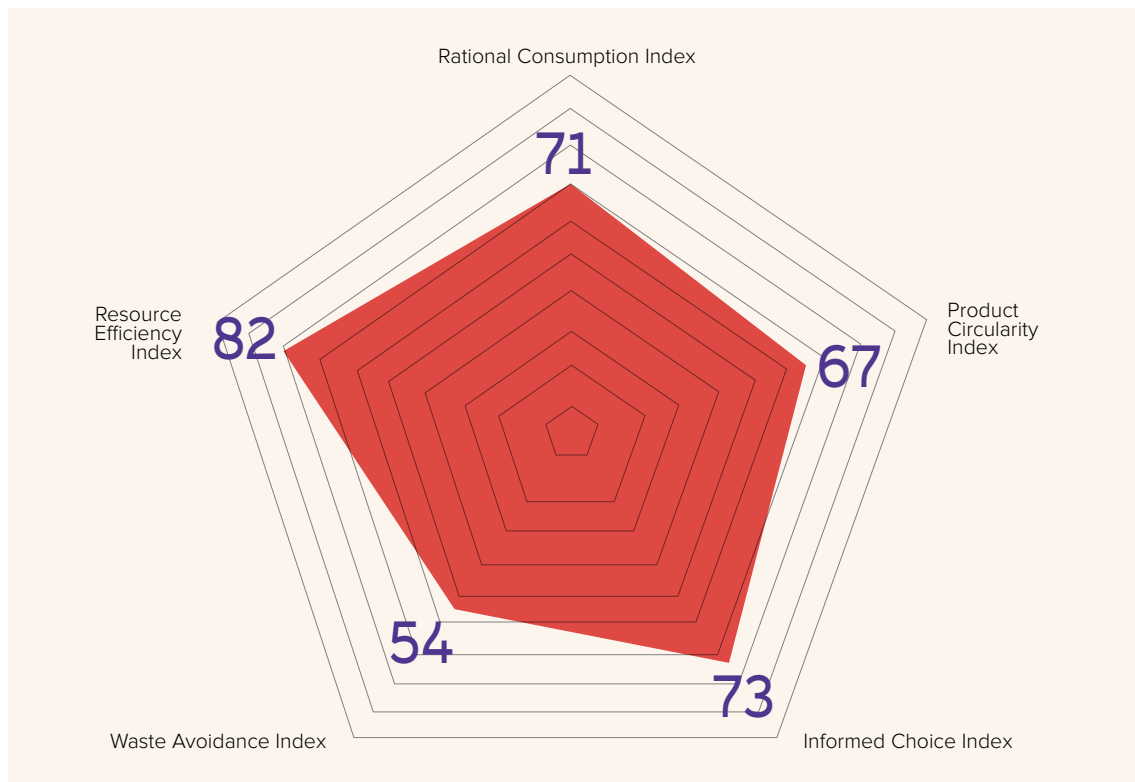
First, “green by necessity” is the dominant pattern. Resource efficiency is the strongest pillar (82/100), meaning that saving energy and water is already a common household routine. Rational consumption (71/100) and product circularity (67/100) also show relatively strong adoption particularly among older respondents and those reporting financial difficulty. This suggests that many sustainable behaviours are linked to budget pressure and practical habits (saving, repairing, keeping items longer, buying less).

Second, informed choice reflects capacity more than age. Informed choice is high on average (73/100), but it varies mainly by education and household economic situation, and it drops sharply under financial strain. This indicates that checking labels and verifying products requires time, confidence and realistic options. The next sections (Purchasing Drivers and Food Safety) show that consumers usually check information first for safety and reliability, and only secondarily for environmental claims.

Third, waste avoidance is limited by the system. Waste avoidance is the weakest pillar (54/100) and does not vary much across groups. This is consistent with a context where packaging options, refill/ return solutions and waste services strongly shape what consumers can do. Progress here will require better infrastructure and market incentives, not only awareness campaigns.

Overall, the five pillars suggest that sustainability in Albania is strongest where it helps households **manage costs and reduce risk**, and weaker where it depends on **external systems**.

FIGURE 18. OVERVIEW OF THE 5 BEHAVIOR INDICES (0-100)



Purchasing Drivers: Hierarchy of choice

Respondents were asked to rank the three most important attributes they look at when choosing products in three everyday categories: fresh fruit and vegetables, packaged food, and household detergents. The percentages shown below represent the share of consumers who included each attribute in their top three.

The data indicates that across all three categories (fresh produce, packaged foods, and detergents), the decision-making process is dominated by functional attributes: **safety, quality, and habit**.

TABLE 2. MAIN DECISION DRIVERS BY PRODUCT CATEGORY

| Fruits/Vegetables | | Packaged food | | Detergents | |
|-----------------------|-----|----------------------|-----|--|-----|
| Quality/Freshness | 75% | Expiry date | 94% | Effectiveness | 86% |
| No pesticides | 64% | Brand | 73% | Brand | 55% |
| Domestic product | 33% | Price | 48% | Price | 52% |
| Price | 30% | Ingredient list | 40% | I take what I always take | 44% |
| Appearance | 20% | Imported product | 21% | Safety label ("non-toxic") | 26% |
| Seller recommendation | 9% | Domestic product | 17% | Imported product | 18% |
| Imported product | 2% | Recyclable packaging | 5% | Recyclable packaging | 5% |
| | | | | Eco-label certificate (less harmful for env) | 5% |
| | | | | Refillable packaging | 4% |
| | | | | Domestic product | 4% |

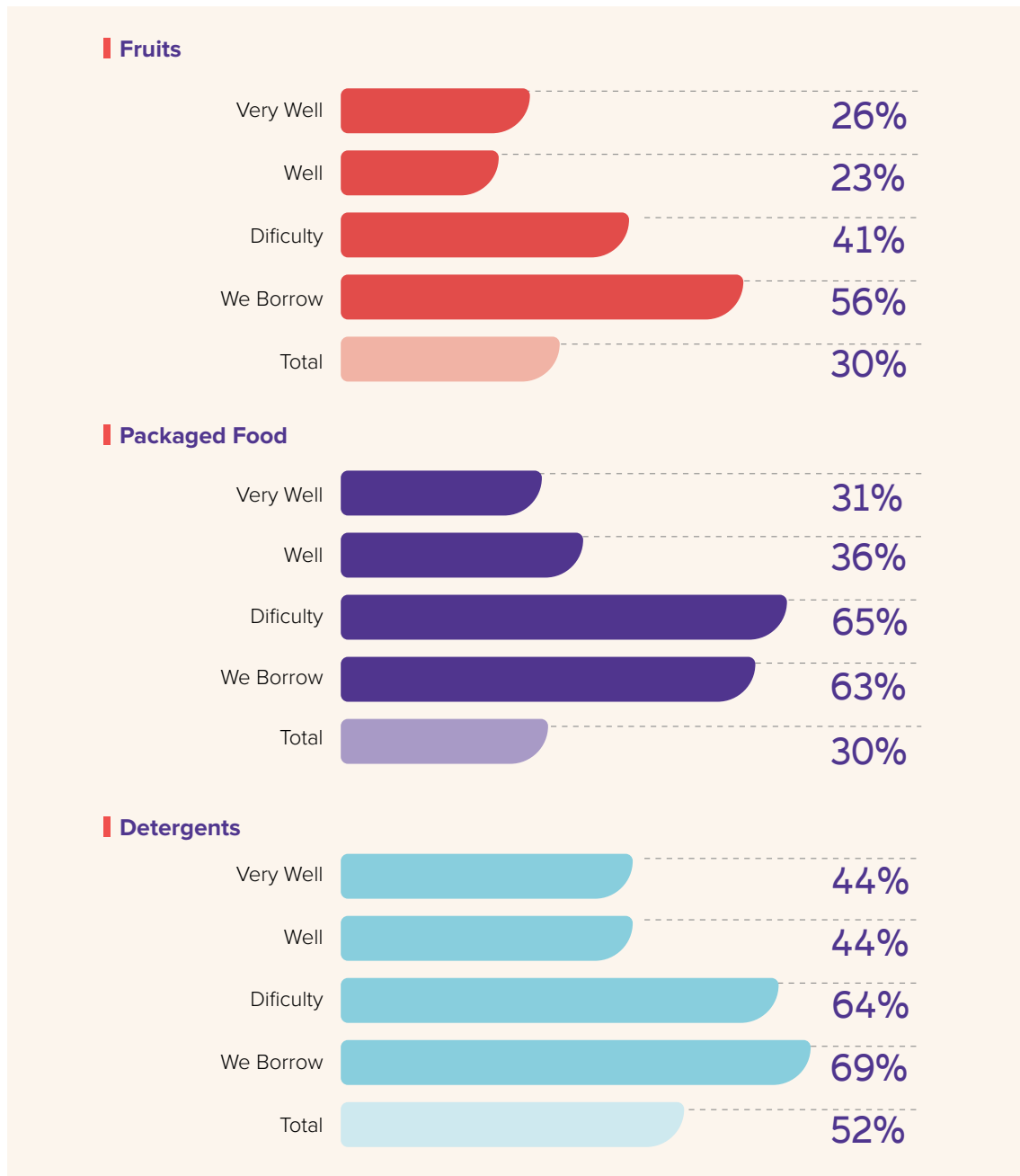
Safety and hygiene as the primary filter

Before price or brand is even considered, the product must pass a rigorous safety check. The highest reported value in the study is the checking of expiration dates on packaged food (94%). This near-universal behavior reflects a high level of vigilance regarding market standards. Similarly, for fresh produce, the absence of pesticides is the second most critical factor (64%). Consumers view "chemical-free" not as an environmental preference, but as a basic health requirement.

Economic constraints and price sensitivity

Once the safety baseline is met, price becomes a decisive filter, especially for households under financial stress. In this report, price sensitivity is measured as the share of respondents in each economic group who selected “low price” among their three most important reasons for choosing a product.

FIGURE 19. PRICE SENSITIVITY BY REPORTED FAMILY ECONOMICAL SITUATION



Note: Long names of economical situations category

- We manage very well with our income (N=68)
 ➤ We manage with difficulty (N=384)
- We manage well with our income (N=524)
 ➤ We do not manage / we borrow (N=18)

As shown in Figure 19 price sensitivity is not uniform; it is structural.

Respondents reporting financial distress (“We manage with difficulty”) are significantly more price-sensitive than those in better financial situations. In the detergents category, price sensitivity jumps to **64%** for this group, compared to just 44% for those who manage well. For the most vulnerable segment (“We do not manage”), price effectively becomes the only driver.

Brand and habit as risk management

For processed and industrial goods like packaged foods (73%) and detergents (55%), brand reliability is a central driver. It is selected as a top-three reason by 73% of respondents for packaged food and 55% for detergents.

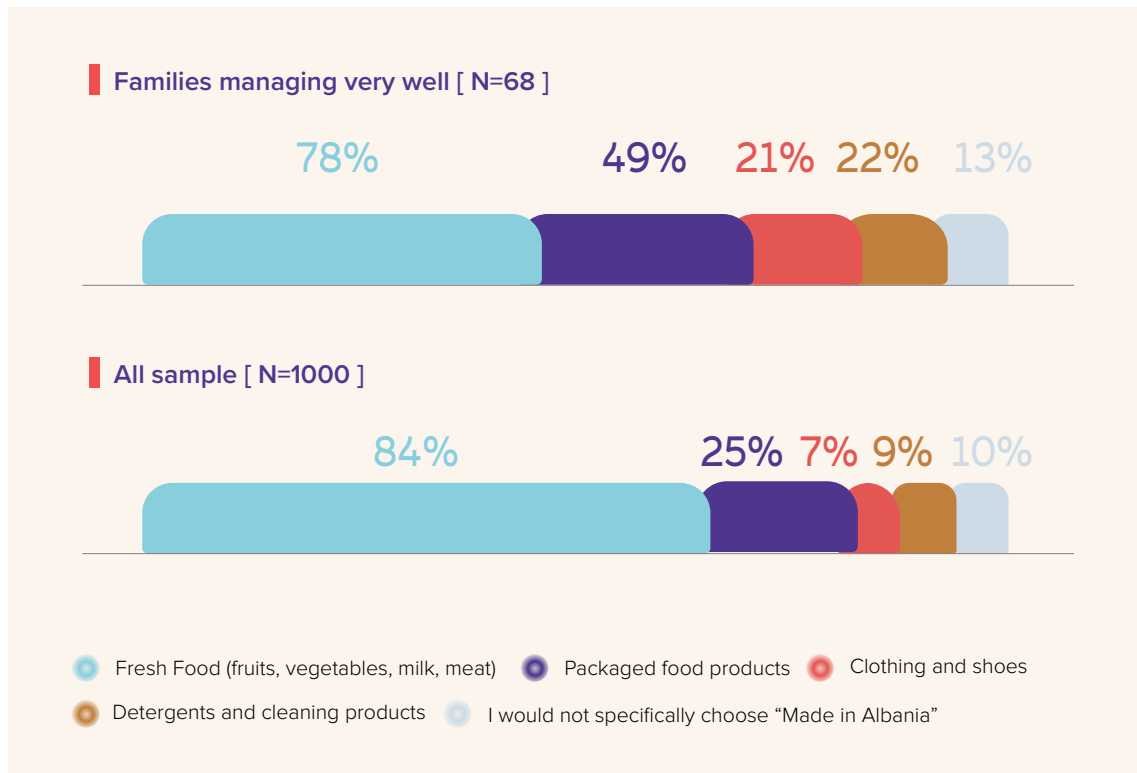
At the same time, 44% of detergent buyers include “I take what I always take” among their main reasons. This suggests that brand attachment is driven less by emotional loyalty and more by habitual risk avoidance. Once a product has proved to be safe and effective, many consumers prefer to repeat the same choice rather than risk wasting limited resources on something untested.

Origin and the “Made in Albania” paradox

Preferences around product origin show a split between agricultural and industrial products, and are further shaped by income.

For fresh food, “domestic product” is an important driver (33% selected as top 3). Albanian origin is associated with freshness, proximity and known farming practices, and this is confirmed by the very high share of respondents who say they would choose a “**Made in Albania**” option for fresh food when price and quality are equal.

FIGURE 20. WHO LOVES “MADE IN ALBANIA”? BY INCOMES



For **processed and cleaning products**, domestic origin almost disappears from the decision set. For detergents, only 4% of the general sample select “domestic product” as a top-three reason, and preferences shift towards imported brands, which are perceived as more reliable for factory-made goods. However, the “Made in Albania” label appeals primarily to the wealthy. **High-income households (“We manage very well”)** are significantly more likely to choose domestic products across all categories—including packaged foods (49% vs. 25% average) and detergents (22% vs. 9% average). This suggests that supporting national industry is currently a value-based choice accessible mainly to those with financial security.

Green gap

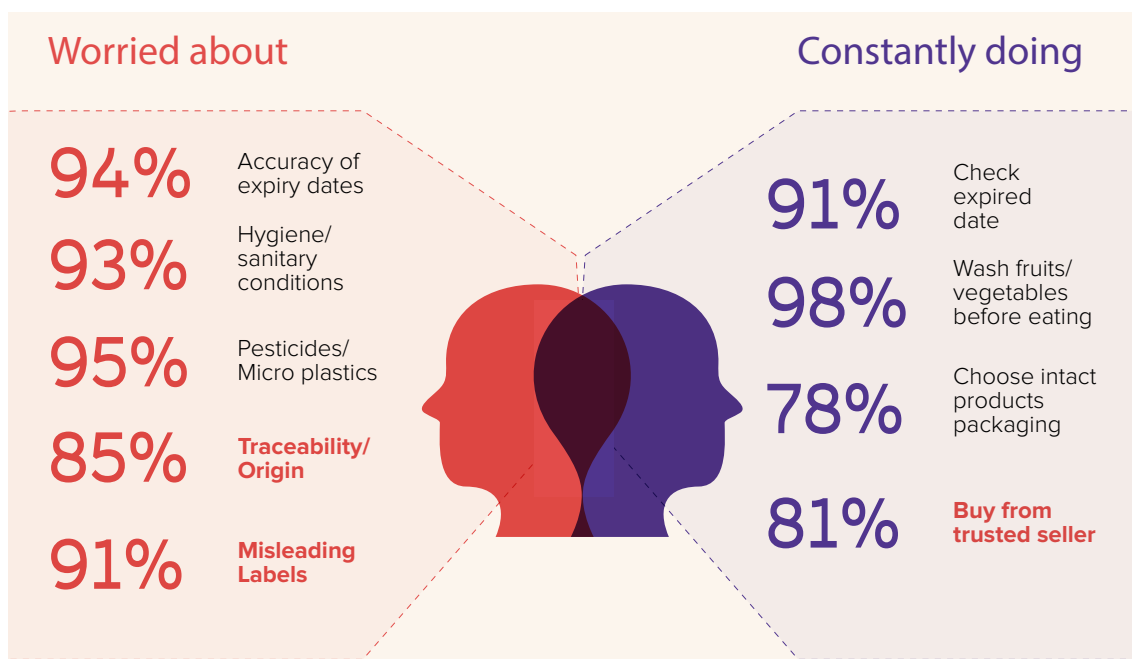
In this landscape defined by safety anxiety and price pressure, environmental attributes rank last. Features such as “Recyclable packaging,” “Refillable,” or “Eco-certificates” are prioritized by only 4% to 5% of consumers. Without a clear link to immediate family health or cost savings, environmental claims are insufficient to compete in the mass market.

Trust in Food Safety

The strong focus on safety checks in purchase decisions points to a deeper underlying issue: **low consumer trust in the food system**. The data reveals a systemic crisis of confidence: consumers do not trust that the food sold in the country is inherently safe, leading to a shopping culture characterized by hyper-vigilance and defensive behavior.

This concern is not abstract; it reflects recent market failures of 2024–2025 described in the Context session including EU border rejections and cases involving tampered expiration dates.

FIGURE 21. FOOD SAFETY: FROM WORRY TO CONSTANT CHECKING



A climate of worry

As shown in Figure 21 almost everyone reports being worried about several aspects of food safety – pesticides and micro-plastics, expiry dates, hygiene conditions, misleading labels and unclear origin. These are not abstract fears. They mirror the concrete cases described in the context section: rejected exports at EU borders, investigations into manipulated expiry dates, and questions around how well the system controls what reaches the shelves.

This combination of incidents and everyday uncertainty has created a low level of trust in the overall food system. People do not feel that checks and standards are enough on their own, so they compensate by being more vigilant themselves.

From worry to constant checking

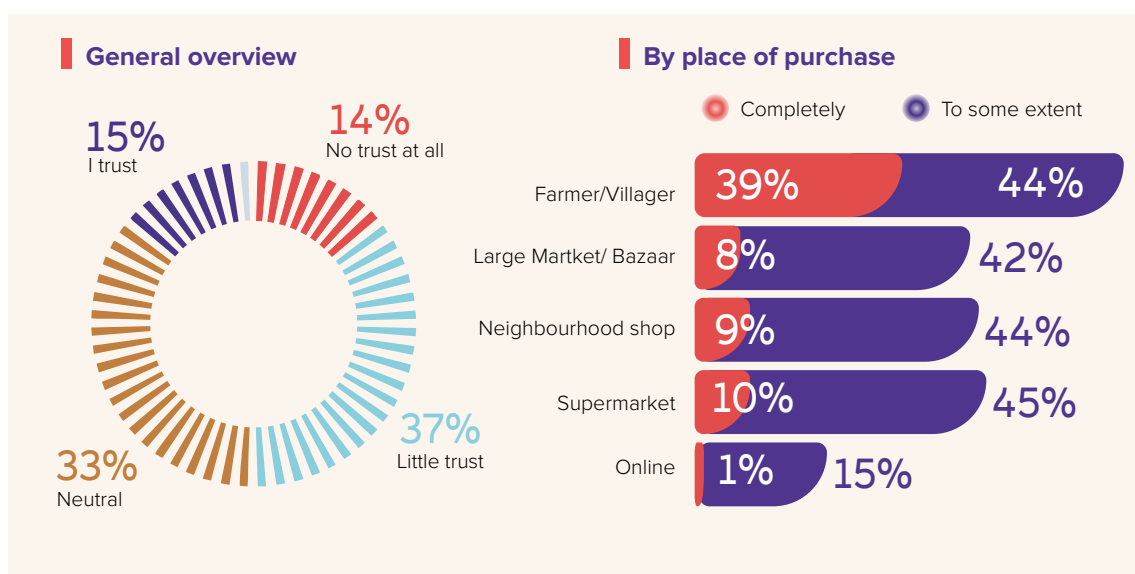
Because institutions are not trusted to filter out these risks, consumers have adopted “defensive” shopping habits. As shown in the behavioural data, 91% report constantly checking expiration dates not as a casual habit, but as a necessary audit, and 98% wash fruits and vegetables specifically to remove potential chemicals and the same share buy from a trusted seller.

These actions have become part of normal shopping. Buying food is treated as a form of risk management: consumers constantly check, compare and filter what they buy in order to protect their families. Environmental aspects of food (for example “organic”) are read through this same lens – first and foremost as a promise of safer, cleaner food, not as a climate action.

System trust is low, trust in people is high

This hyper-vigilance stems from a fundamental lack of faith in the market. As illustrated in the Figure 22, systemic trust is critically low. Only a small minority (15%) say they trust the quality of food sold in Albania, while about half express little or no trust. One third sit in the middle, not confident enough to say they trust the system.

FIGURE 22. TRUST IN THE QUALITY OF THE FOOD SOLD IN ALBANIA



When institutions are not fully trusted, people turn to people. The right part of Figure 22 shows a sharp difference in trust depending on who sells the food:

- ✎ Trust is highest when buying directly from a farmer or ambulant seller (around 83%). In this case, the seller is known, the chain is short, and the risk of hidden manipulation feels lower.
- ✎ Bazaars, supermarkets and neighbourhood shops sit in the middle, with roughly half of respondents saying they trust these channels. They are part of the formal system, but still offer some personal familiarity.
- ✎ Trust drops strongly for digital sellers (around 15%). Without a face or a known location, online channels are perceived as too risky for food.

For many Albanians, knowing who they buy from is more reassuring than any logo or label. Personal relationships and long-term acquaintance act as an informal quality certificate when the formal system is not fully trusted.

Willingness to Pay

Respondents were first asked, in general, how much more they would pay for a product that is “better for the environment”. They were then given three scenarios—**organic tomatoes, eco-detergents, and energy-saving washing machines**—and asked what extra price they would accept compared with a normal product.

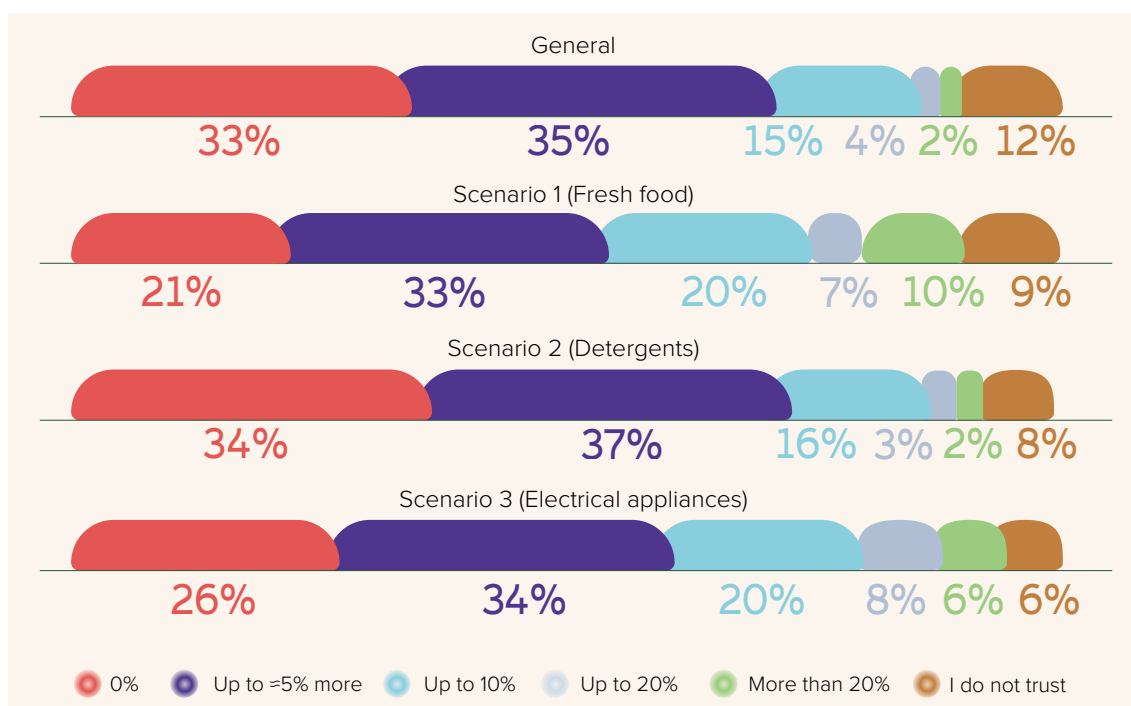
The general answers show a clear limit. Around one third of respondents say they would not pay anything extra. Many others say they would accept only a small increase of up to 5%. Only a small group would consider paying more than 10–20%.

Willingness to pay is highest when the benefit feels direct and personal. This is the case for organic tomatoes, which are linked to health and taste, and for energy-saving appliances, which can reduce electricity bills over time. In these cases, the extra cost is seen as a practical choice for the family.

Willingness to pay is lower for eco-detergents. Here, the main benefits are seen as environmental rather than personal, so fewer people are ready to pay a premium.

Overall, people are not against greener products. But in everyday life, price matters first. The survey suggests that people are more likely to pay extra when sustainability is connected to family health or saving money, and less likely when benefits feel indirect or uncertain.

FIGURE 23. WTP BY PRODUCT SCENARIO



Scenario 1: *If one kilogram of tomatoes costs 100 lek, how much more would you be willing to pay for a version certified organic and pesticide-free?*

Scenario 2: *If a detergent costs 500 lek, how much more would you be willing to pay for a version with biodegradable formula or refillable bottle?*

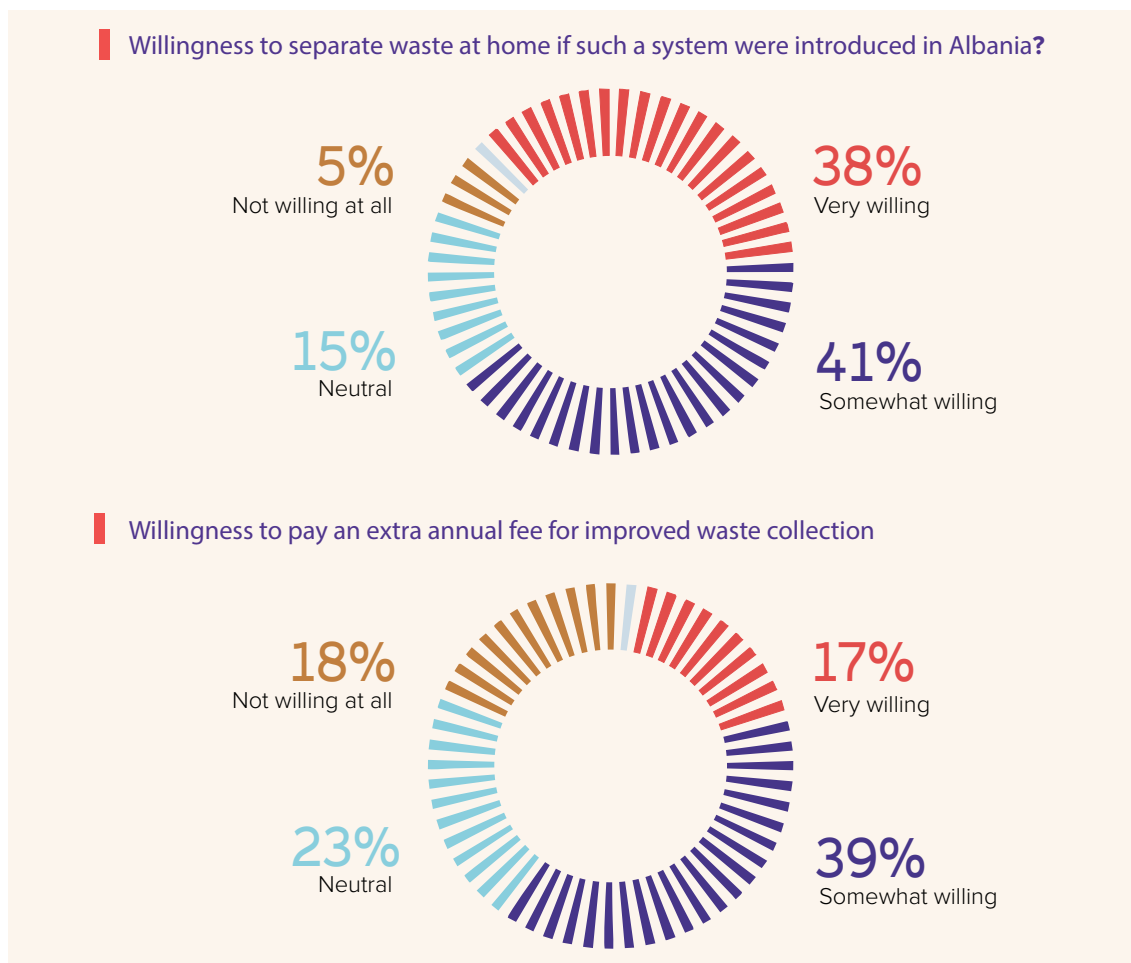
Scenario 3: *If a standard washing machine costs 40,000 lek, how much more would you be willing to pay for an energy-saving version (A+++)¹ with 5-year warranty?*

Waste Management: Willingness vs System Confidence

When asked whether they would separate their household waste if a proper system was in place, about 79% of respondents said yes. However, when asked whether they would also be willing to pay an additional fee for improved collection and recycling, support dropped to around 56% (see Figure 24).

This gap reflects the wider context described earlier. On the one hand, many households face tight budgets; on the other, people know that today’s system is still simply “collect and dump”, with no separate collection and a history of controversy around incinerator contracts. As a result, some consumers are reluctant to pay more for a service they are not confident will actually recycle their waste.

FIGURE 24. WILLINGNESS TO SORT VS WILLINGNESS TO PAY



Willingness to separate waste is high, but confidence in the system is low. For many households, paying extra only makes sense if they can see clear, trustworthy improvements in how waste is actually collected and treated.

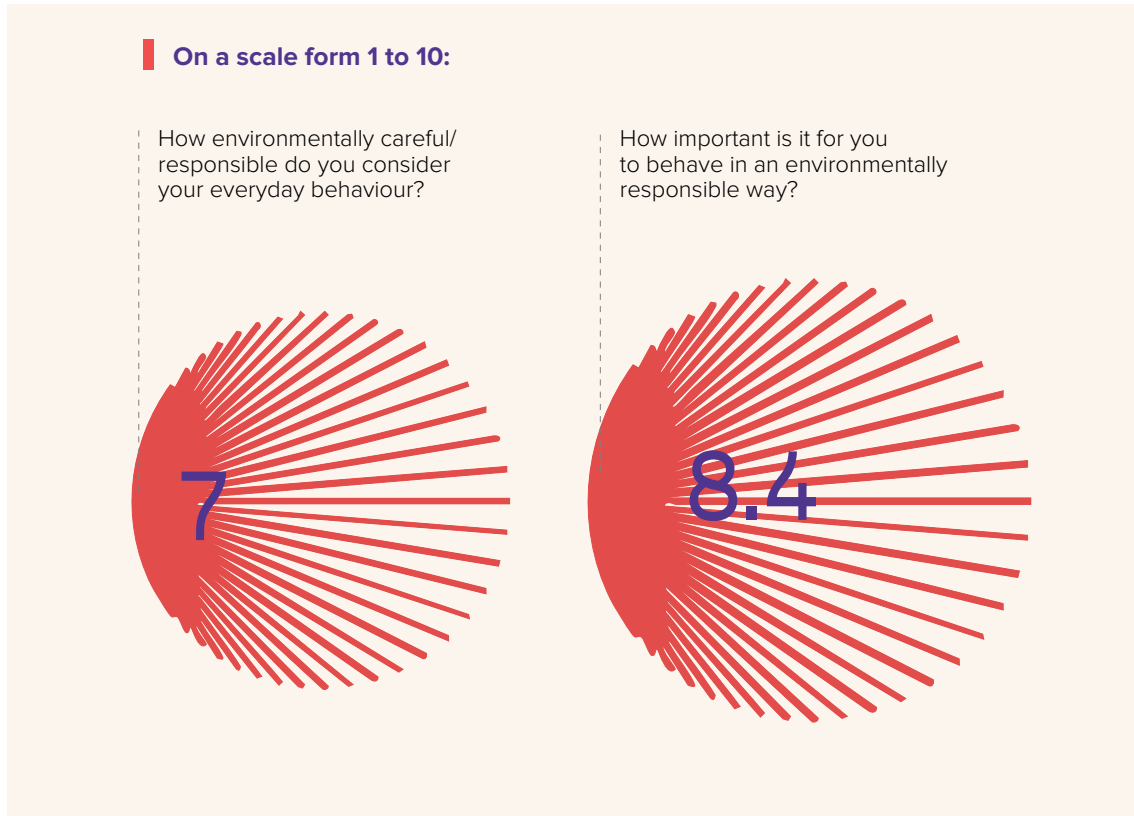
From Intention to Action: Barriers and Conditions for Adoption

Sustainability matters more in principle than in practice

The behavioural indices show that many sustainability-compatible habits already exist in daily life—especially those linked to saving resources and extending product life—while other behaviours remain mid-range (notably waste avoidance). To understand this uneven pattern, the following section looks at attitudes and perceived barriers to choosing “green” options when shopping, including trust in labels and the conditions that would make adoption easier.

On a 1–10 scale, respondents rate the importance of behaving in an environmentally responsible way at 8.4, while rating their own day-to-day behaviour at 7 (Figure 25).

FIGURE 25. HOW IMPORTANT VS. HOW ENVIRONMENTALLY RESPONSIBLE PEOPLE SAY THEY ARE

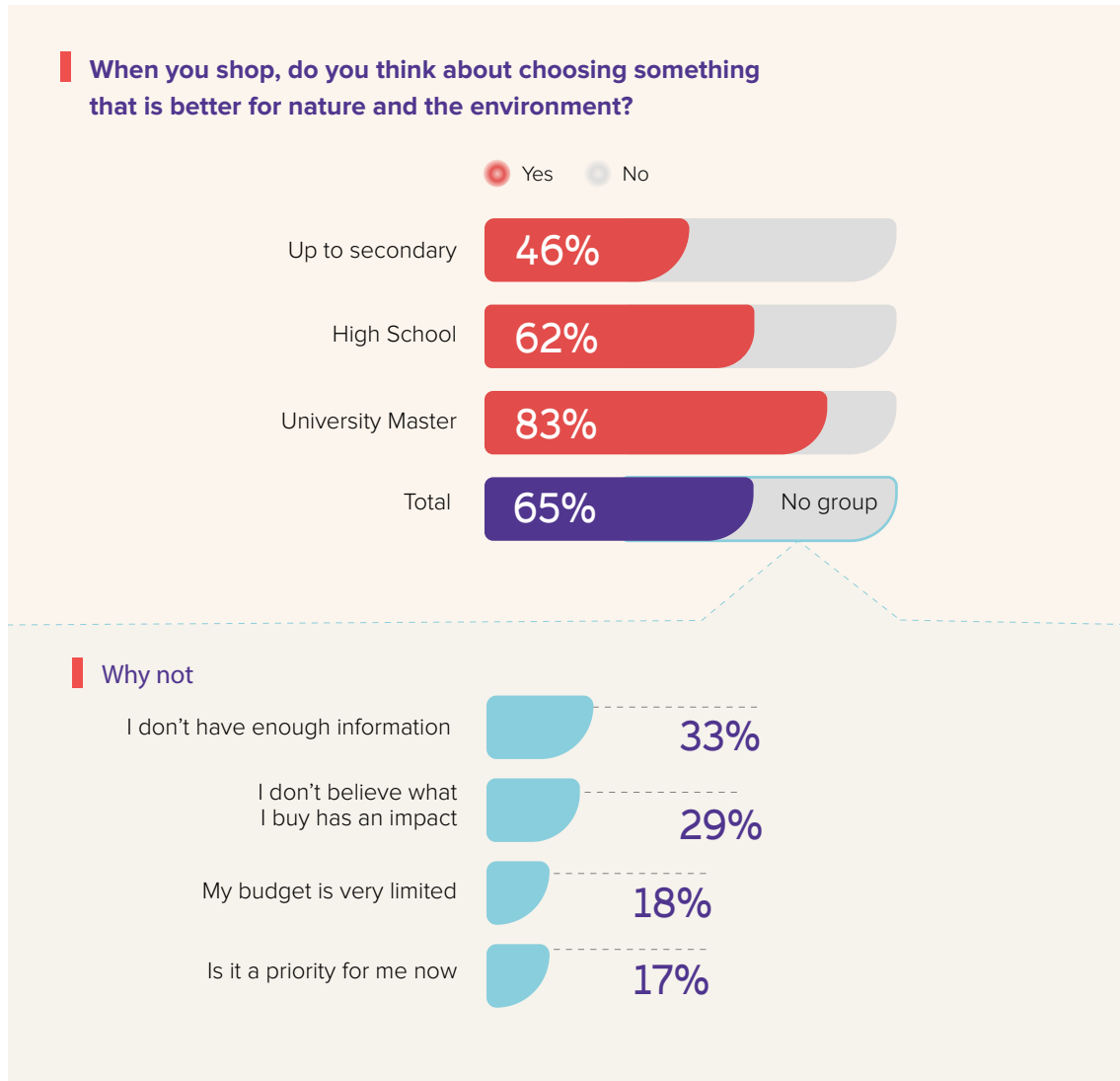


The gap of around 1.4 points is statistically significant and indicates a consistent pattern throughout the report: **sustainability is widely supported in principle, but it is less consistently translated into everyday practice.** This aligns with the behavioural indices presented earlier—especially for dimensions where the “system” (availability, infrastructure, credible information) limits what people can realistically do.

Thinking “green” increases with education, but information and credibility are the main obstacles

The first barrier to closing this gap is cognitive: simply “thinking green” is unevenly distributed and heavily dependent on education. Only **46%** of respondents with secondary education report considering environmental impact during shopping, a figure that rises to **83%** among university graduates. Crucially, for those who do not consider these factors, the primary obstacle is not apathy or budget, but an information deficit. A third of non-engaged consumers (**33%**) state they lack sufficient information, and **29%** doubt their individual impact, whereas only **18%** cite budget limitations as the main reason for not “thinking green”. This indicates that the first constraint is not only affordability, but also whether people have clear and credible reasons to believe that “green” choices matter and can be identified reliably.

FIGURE 26. HOW OFTEN AND WHY NOT



For those who try, confusion comes first—price, habit, and access come next

For consumers who *do* attempt to shop sustainably (N=648), the main barrier shifts from awareness to trust. The market is characterized by profound confusion: **73%** of those who try to buy greener products admit they are either unsure if the products are truly better or do not know which ones to choose. This hesitation is compounded by a severe crisis of confidence in eco-labelling. Only a tiny minority (**2%**) “fully believe” that products advertised as environment-friendly are genuine, while nearly **40%** are distrustful and approximately one-third associate green labels primarily with higher prices or marketing exaggeration. In this “grey zone” of trust, the “Green Premium” becomes a prohibitive risk; consumers are not just unwilling to pay more, they are unwilling to pay extra for claims they do not feel confident are credible or verifiable.

FIGURE 27. DIFFICULTIES FACED WHEN TRYING TO BUY, FOR PEOPLE THAT CONSIDER BUYING “GREEN”

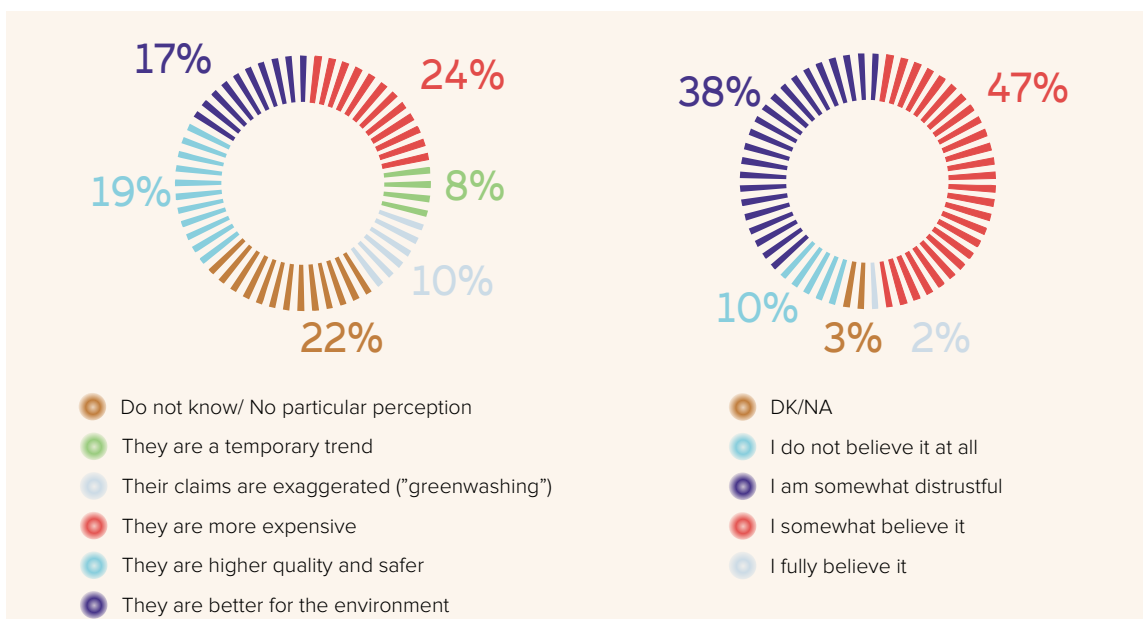


“Green” labels sit in a trust grey zone

The label results help explain why “information” is repeatedly mentioned as a barrier. When asked what comes to mind with “green/environment-friendly” labels (Figure 28), only about one third associate them with environmental benefits or better quality/safer products, while a similar share primarily think of higher prices or exaggerated claims (“greenwashing”). Around one in five report no clear perception. Trust levels confirm this ambivalence (Figure 29): only **~2%** fully believe such claims; **47%** “somewhat believe”; almost **40%** are somewhat distrustful and around **1 in 10** do not believe such claims at all. In other words, most consumers do not fully reject “green”—but they also do not feel confident enough to pay extra for it.

FIGURE 28. PERCEPTION ABOUT PRODUCT LABELLED AS “GREEN”, “ENVIRONMENT-FRIENDLY”

FIGURE 29. TRUST THAT A PRODUCT ADVERTISED AS “ENVIRONMENT-FRIENDLY” REALLY IS?



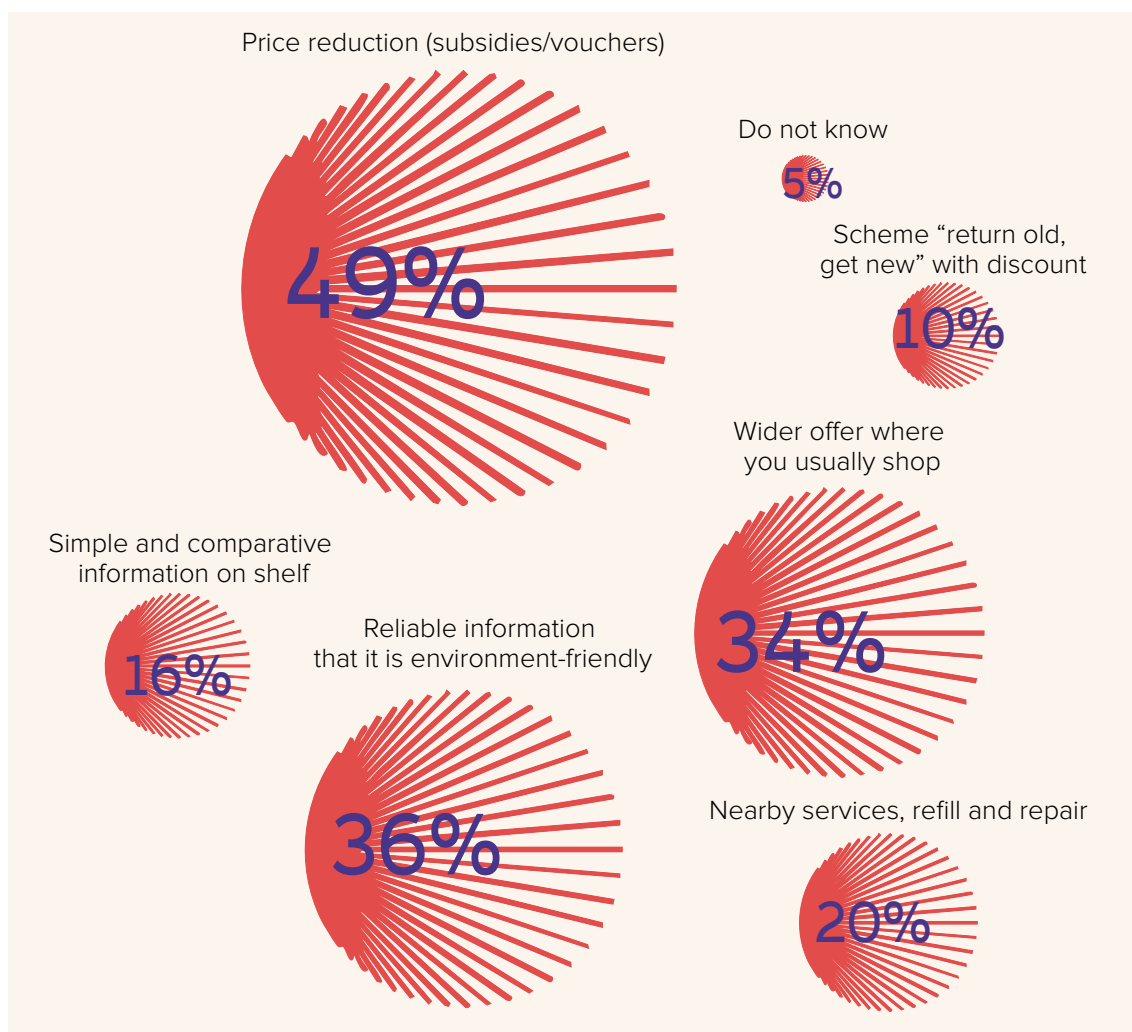
As the previous sections on purchasing drivers and food safety show, label-checking and product scrutiny often reflect a search for **safety, value, and trusted brands**, rather than a purely environmental motivation.

What would unlock adoption: cheaper, truer, closer

Bridging this gap requires addressing the three specific demands of the consumer: making sustainable options **cheaper, truer, and closer**. When respondents are asked what would encourage them to choose more environment-friendly products (Figure 30), three conditions stand out. The data is unequivocal that price reduction is the single most powerful driver (**49%**), confirming that the current price premium is the primary bottleneck. However, price support must be accompanied by “Reliable Information” (**36%**) and better accessibility (**34%**). Consumers are explicitly asking for verifiable proof to counter “fake bio” claims and demanding that green products should be available in standard supermarkets rather than niche specialty stores.

Until the market can offer credible products at competitive prices in convenient locations, the intention-action gap is likely to remain wide.

FIGURE 30. WHAT WOULD ENCOURAGE YOU TO CHOOSE MORE ENVIRONMENTALLY FRIENDLY PRODUCTS?



Discussion and implications for next steps

The findings confirm that Albania's sustainable consumption profile is shaped by a distinctive combination of household pragmatism, generational norms of thrift, and ongoing affordability pressures. Many behaviours aligned with circular economy principles are already embedded in daily life. However, the weakest points—especially waste avoidance and the limited willingness to fund improved services—highlight the role of infrastructure and the importance of system credibility.

The evidence suggests that consumer inertia is not the primary constraint. Instead, Albania faces a dual challenge of affordability and trust. This reinforces the policy logic that **awareness campaigns alone are unlikely to deliver large gains unless they are paired with credible enforcement and practical service improvements.**

Implications for next steps

👉 **Start with understanding, not labels.**

Environmental literacy is low and the vocabulary around sustainability is fragmented. Any next step will need to simplify language, connect it to everyday concerns (health, savings, cleanliness) and treat “education” as an ongoing process, not a one-off campaign.

👉 **Rebuild trust before expecting behaviour shifts through markets.**

With low trust in institutions and labels, and high reliance on known sellers, the transition towards greener consumption will depend on visible, credible guarantees and actors people already trust (local vendors, farmers, community figures) rather than on logos alone.

👉 **Design change under a “zero-premium” constraint.**

Since willingness to pay extra is almost zero, realistic next steps have to assume no green price premium: greener options will need to be cost-neutral or cheaper over time, or bundled with clear personal benefits (healthier, safer, longer-lasting).

👉 **Leverage high willingness to participate.**

People say sustainability is important and are ready to sort waste, check, wash, adapt routines. This means next steps can build on a strong readiness to act, as long as participation is made simple, affordable and visibly meaningful.

👉 **Prioritize systems and infrastructure that make “the right thing” easy.**

Because effort at household level is already high, but systems are weak, the logical next step is to improve the enabling environment (waste collection, reliable controls, clearer information in shops), so that people's willingness can translate into consistent practice.

👉 **Anchor all actions in the everyday concerns people already have.**

Across all dimensions, the findings imply that future interventions will work best if they enter through food safety, family health and household budgets, and only then expand the narrative to climate, circularity and SDGs.

Annexes

Annex A. Sampling and Fieldwork Design

1 Study Design and Scope

This study employs a quantitative, face-to-face survey design implemented in urban areas of Albania. The survey focuses on consumer awareness, purchasing and consumption practices, perceptions of food safety and trust, and attitudes toward waste separation and service fees within urban retail and municipal service environments.

- **Universe:** Adult population (18+) resident in **urban areas** of Albania.
- **Exclusion criteria:** Rural areas were excluded to focus on the urban “friction zone,” where traditional habits interact with modern retail formats and municipal waste systems.
- **Sample size: N = 1,000** completed interviews.
- **Fieldwork period:** October 2025.
- **Mode:** CAPI (Computer-Assisted Personal Interviewing) using tablets.

2 Sampling Frame

The sampling frame combined demographic population benchmarks with an operational list of sampling points to support both statistical structure and field execution.

Demographic structure (Population and Housing Census 2023)

The sample allocation across strata was guided by the 2023 census distribution. This ensured that the achieved sample reflected the relative size of the urban adult population across Albania’s regions), including appropriate representation of high-density areas such as Tirana.

Operational frame (National Registry of Voting Centres, 2025)

The 2025 registry of voting centres (VCs) was used as an operational list of **Primary Sampling Units (PSUs)** for selecting urban starting points.

- **Total universe:** 5,225 VCs nationwide.
- **Selected urban PSUs:** 100 urban VCs.

3 Sampling Procedure (Stratified Multi-Stage Cluster Design)

The sample was selected using a **stratified, multi-stage cluster design**, moving from region-level selection to households and then individuals.

Stage 1. Selection of PSUs (Voting Centres)

A total of 100 urban voting centres were selected from the national list using Probability Proportional to Size (PPS). This approach ensured that larger urban population clusters had a higher likelihood of selection, consistent with their share of the urban population. The resulting distribution of selected PSUs therefore reflects the underlying structure of urban density across regions.

- **Method:** PPS selection using standard sampling procedures.
- **Outcome:** 100 selected urban VCs as field starting points.

(Optional to include a short note rather than a figure)

PPS ensures that high-density urban areas are appropriately represented without over-relying on post-survey weighting.

Stage 2. Household selection (Random Route)

Within each selected VC area, interviewers applied a standardized **random-route protocol** to select households. This procedure was designed to reduce interviewer discretion and maintain consistency across clusters.

- **Cluster size: 10 interviews per VC (100 VCs × 10 interviews = 1,000).**
- **Procedure:** Starting from the designated VC point, interviewers followed the approved random route rules for direction and interval selection.
- **Non-response protocol:** In case of refusal or non-contact, interviewers proceeded according to the pre-defined skip/ next-household rules.

Stage 3. Respondent selection within households

In each selected household, one adult aged 18+ was chosen using the Last Birthday Method to minimize selection bias toward individuals more likely to be at home.

- **No substitution:** If the selected respondent was unavailable, a callback was scheduled.
- **Eligibility:** Permanent adult household members aged 18+.

4 Fieldwork Quality Measures

Field implementation followed standard quality assurance procedures, including:

- training on sampling rules and respondent selection;
- supervisor checks to confirm adherence to random-route and no-substitution protocols.

Annex B. Data Processing and Statistical Analysis

Following fieldwork, the raw dataset underwent structured cleaning, validation, and statistical analysis. Data were collected using KoBoToolbox (CAPI) and exported into **IBM SPSS Statistics** for processing and analysis.

Data cleaning and validation

Prior to analysis, the dataset was reviewed to ensure completeness, internal consistency, and adherence to the questionnaire structure. Key steps included:

- **Logic and skip-pattern verification:** Checks to confirm that responses followed the intended routing of the questionnaire and that ineligible items were not systematically answered.

- **Range and consistency checks:** Identification of invalid values, contradictory responses across related items, and unusual patterns requiring verification.
- **Missing data review:** Assessment of item non-response and evaluation of whether missingness was random or concentrated in specific sections or groups.
- **Outlier screening (where applicable):** Identification of extreme values in numeric or scaled variables to ensure that summary statistics were not distorted.

Reliability assessment of multi-item constructs

Where indices or grouped measures were constructed from multiple items, internal consistency was assessed using **Cronbach's alpha**. Reliability results were reviewed to confirm that items contributed to coherent constructs before finalizing composite scores. When values suggested weaker coherence, item groupings were re-examined and refined where appropriate.

Testing group differences and associations

To examine whether observed differences across population groups were statistically meaningful, the analysis applied standard inferential tests:

- **Pearson Chi-square (χ^2):** Used for categorical variables to assess associations (e.g. differences in willingness to separate waste by age group, education, or perceived family economy).
- **One-way ANOVA:** Used to compare mean index scores across demographic groups (with post-hoc comparisons applied where relevant).

These tests supported interpretation of differences across regions, gender, age cohorts, education levels, employment status, and perceived family economic situation.

Exploratory structure checks

Where appropriate, **Principal Component Analysis (PCA)** was used to review the underlying structure of sets of related items and to assess whether they clustered consistently with the intended conceptual groupings. PCA results were used as a supporting check to confirm coherence of multi-item measures and inform refinement of index composition where needed.

Annex C: Index construction and score standardization

Index construction

To capture behaviours more reliably than single items, related Likert-scale questions were aggregated into composite measures. The analysis included five behavioural indices:

- Rational Consumption
- Product Circularity
- Informed Choice
- Waste Avoidance
- Resource Efficiency

For each sustainability dimension (Rational Consumption, Product Circularity, Informed Choice, Waste Avoidance, Resource Efficiency), several survey items were combined into a single composite index. This aggregation reduces noise from individual questions and provides a more robust measure of the overall behavioral habit.

Score calculation

Respondents were asked to rate their agreement with specific daily behaviors on a Likert Scale of 1 to 5 (1 = Strongly Disagree - 5 = Fully Agree). To allow for precise comparison across categories, these raw responses were standardized into a 0–100 Behavioral Index where:

- 👉 **0** = The behavior is **never** performed (or totally rejected).
- 👉 **100** = The behavior is **always** performed (or fully embraced).

Items were harmonized for direction, including **reverse coding where required**, and aggregated into index scores. Results were converted to a **0–100 scale**, where higher values represent stronger sustainability-compatible practices.

TABLE 3. BEHAVIOURAL INDICES: CONCEPTUAL DEFINITION AND ITEMS INCLUDED

| Behavioural index | What it captures | Items included (examples from questionnaire) |
|--|---|---|
| Rational Consumption (“Less is Enough”) | Avoidance of unnecessary purchases and comfort with a simpler lifestyle. | <ul style="list-style-type: none"> 👉 I often buy the latest fashion (<i>reverse-coded</i>) 👉 I often buy the newest electronics (<i>reverse-coded</i>) 👉 I limit purchases to only what I need |
| Product Circularity (“Make it Last”) | Repair, reuse, second-hand orientation, and value placed on durability. | <ul style="list-style-type: none"> 👉 I usually keep the things I have for a long time 👉 I repair before I replace 👉 I recycle/reuse unwanted items 👉 I usually buy used things (e.g. second-hand clothes) |
| Informed Choice (“Know What You Buy”) | Checking information, labels, and origin before purchasing; relying on trusted verification channels. | <ul style="list-style-type: none"> 👉 I check Eco/Organic labels? 👉 I check Energy Labels (A+++)? 👉 I buy directly from farmers (to verify origin)? |
| Waste Avoidance (“Use, Don’t Waste”) | Everyday efforts to reduce packaging and avoid single-use items. | <ul style="list-style-type: none"> 👉 I avoid excessive packaging 👉 I avoid single-use products whenever possible 👉 I bring my own shopping bag |
| Resource Conservation (“Bills and Footprint”) | Saving electricity and water and choosing lower-impact ways of moving around. | <ul style="list-style-type: none"> 👉 I actively save energy (e.g. AC/lights) 👉 I save water (e.g. shorter showers) 👉 I walk/bike instead of driving when possible |

Reverse-Coding Approach (Rational Consumption)

The Rational Consumption index includes statements that reflect high-consumption or status-oriented behaviour. These items were reverse-coded so that the final index consistently measures careful and needs-based consumption.

Examples of reverse-coded items include:

- buying the latest fashion
- buying the newest electronics.

After reverse coding, higher Rational Consumption scores indicate greater restraint and more purposeful purchasing.

Interpretive Bands (0–100 Scale)

For reporting purposes, index scores can be interpreted using four broad bands:

➤ **0–39: Low adoption**

Behaviour is weak, inconsistent, or not yet part of routine practice.

➤ **40–59: Moderate adoption**

Some positive habits present, but not stable or widespread.

➤ **60–79: Strong adoption**

Behaviour is relatively consistent and more embedded in daily life.

➤ **80–100: Very strong adoption**

Behaviour appears highly established and habitual.

Annex D. Detailed Tables

- Awareness by age and education.
- Detailed behavioural Index scores by age, education, family incomes
- Trust breakdowns by sales channel and category.

Index

| | Age | | | | Family incomes | | | | Education | | | National |
|--|---------------|---------------------|---------------|--------------------|-------------------------------------|--------------------------------|---------------------------|------------------------------|------------------|-------------|--------------------|-----------|
| | Gen Z (18–29) | Millennials (30–44) | Gen X (45–64) | Baby boomers (65+) | We manage very well with our income | We manage well with our income | We manage with difficulty | We do not manage / we borrow | Up to secondary/ | High School | University/ Master | |
| Rational Consumption Index | 59 | 69 | 76 | 80 | 63 | 67 | 76 | 89 | 81 | 68 | 69 | 71 |
| Often buy latest fashion (reversed) | 45 | 62 | 74 | 77 | 51 | 59 | 73 | 84 | 79 | 62 | 60 | 64 |
| Often buy newest electronics (reversed) | 50 | 58 | 67 | 70 | 47 | 56 | 69 | 88 | 75 | 57 | 59 | 61 |
| Like friends to know I have latest trends (reversed) | 61 | 72 | 77 | 83 | 67 | 70 | 77 | 91 | 81 | 70 | 74 | 73 |
| Product Circularity Index | 59 | 67 | 71 | 72 | 63 | 64 | 71 | 79 | 74 | 65 | 66 | 67 |
| Repair before replace (Repair Habit) | 58 | 71 | 75 | 78 | 67 | 66 | 75 | 86 | 79 | 68 | 70 | 70 |
| Recycle/Reuse unwanted items | 52 | 59 | 64 | 63 | 53 | 58 | 63 | 75 | 64 | 58 | 59 | 59 |
| Buy used/second-hand items | 45 | 53 | 57 | 57 | 43 | 51 | 59 | 58 | 60 | 54 | 47 | 53 |
| Informed Choice Index | 73 | 75 | 72 | 70 | 81 | 75 | 68 | 52 | 67 | 72 | 77 | 73 |
| Check Eco/Organic Labels | 69 | 71 | 64 | 63 | 77 | 72 | 60 | 34 | 57 | 66 | 75 | 67 |
| Check Energy Label (A+++) | 77 | 84 | 78 | 75 | 89 | 81 | 74 | 61 | 72 | 77 | 85 | 78 |
| Buy direct from Farmers (Origin) | 73 | 70 | 74 | 73 | 77 | 73 | 72 | 59 | 73 | 73 | 71 | 73 |
| Waste Avoidance Index | 49 | 54 | 55 | 60 | 55 | 54 | 54 | 51 | 53 | 53 | 58 | 54 |
| Avoid excessive packaging | 52 | 55 | 49 | 55 | 57 | 54 | 49 | 38 | 45 | 51 | 59 | 52 |
| Bring own shopping bag | 37 | 45 | 50 | 57 | 50 | 46 | 47 | 58 | 51 | 45 | 48 | 47 |
| Avoid single-use products | 57 | 64 | 67 | 66 | 57 | 62 | 67 | 52 | 62 | 63 | 66 | 63 |
| Resource Efficiency Index | 73 | 80 | 87 | 90 | 81 | 80 | 86 | 92 | 88 | 81 | 81 | 82 |
| Save Energy (AC/Lights) | 80 | 87 | 91 | 93 | 87 | 86 | 90 | 100 | 95 | 86 | 87 | 88 |
| Save Water (Short showers) | 76 | 86 | 91 | 93 | 86 | 84 | 88 | 88 | 91 | 85 | 86 | 86 |
| Walk/Bike instead of drive | 63 | 67 | 79 | 83 | 70 | 69 | 78 | 89 | 79 | 72 | 70 | 73 |

