

Fluoropolymers: Essential for Europe's Digital Economy

Webinar hosted by the Fluoropolymer Product Group (FPG)

19 March 2026

Fluoropolymers



Product Group of Plastics Europe

Webinar Agenda

1. Welcome, About FPG, Introduction of Guest Speakers: Caroline Andersson, Director, FPG
2. Guest Speakers Presentations
3. Q&A
4. REACH Restriction Update & Ongoing Work of FPG: Caroline Andersson

Please note:

- Due to the high number of participants, all participant cameras and microphones are switched off by us.
- The **Q&A** at the end of the event is with written questions only. **Please share your questions for us via the Zoom Q&A tab**. We will try to answer as many questions as possible. Note that we have a FAQ page on our website here: <https://fluoropolymers.eu/>
- The webinar is **not** being recorded.
- The webinar presentations will be made available to all registrants.

About FPG

The **Fluoropolymers Product Group (FPG)** represents Europe's leading fluoropolymer producers and experts

We are the voice of the industry calling for responsible manufacturing, sustainable life cycle management and regulatory clarity.

We are a **Product Group of Plastics Europe**, headquartered in Brussels.

We ensure that fluoropolymers can continue to play their vital role in enabling innovation and sustainability across key industries, including healthcare, renewable energy, semiconductors, transportation and more.

The FPG Members are:



ARKEMA



KUREHA



Today's Speakers



Julio Mateos
Orgalim



Tim Sollberger
DIGITALEUROPE



Maxime Caste
European Semiconductor Industry Association



Diana Radovan
Global Electronics Association

The Relevance of Fluoropolymers for Europe's Technology Industries

Julio Mateos
Orgalim

Fluoropolymers

 Product Group of Plastics Europe

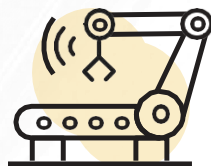


The relevance of Fluoropolymers for Europe's Technology Industries

19 March 2026

Julio Mateos – Policy Adviser

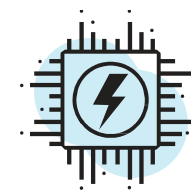
Europe's largest industrial branch



Mechanical
Engineering
ICT



Metal
Technology



Electrical Engineering,
Electronics,
ICT



Annual turnover
comprise of

2,755

billion EUR



Direct employment

11.6

770,000

million people



Annual exports

789

billion EUR



Our industries

companies
orgalim

EUROPE'S
TECHNOLOGY
INDUSTRIES

Membership

49 Member Associations

13 Corporate Members

22 Countries



National Associations

Austria FMTI	
Belgium AGORIA	
Croatia Croatian Chamber of Economy HUP	
Denmark DI	
Finland Technology Industries of Finland	
France FIEEC FIM	
Germany VDMA WSM ZVEI	
Great Britain BEAMA GAMBICA	
Hungary MASGEOZ	
Ireland Ibec	

Italy ANIE ANIMA	
Latvia MASOC	
Lithuania LINPRA	
Luxembourg FEDIL Metal	
The Netherlands FME METAALUNIE	
Norway Norsk Industri	
Portugal AIMMAP	
Slovenia GZS-CCIS	
Spain SERCOBE	
Switzerland SWISSMEM	
Sweden TEKNIKFÖRETAGEN	
Turkey MAKFED	

Associate members

Sector Associations

AFECOR		
AQUA		
CECAPI		
CECE		
CEIR		
CEMA		
CEMEP		
CEO		
C.E.F.A.C.D.		
EFCEM		
EGMF		
EUNITED		
EURALARM		
EUROPACABLE		
EUROPUMP		
FARECOGAZ		
FEM		
FEPA		
PNEUROP		
T&D Europe		
Orgalim for Corporates		
AMAZON		
BOSCH REXROTH		
DANFOSS		
EATON		
FASTEMS		
MICROSOFT		
PEPPERL+FUCHS		
PHOENIX CONTACT		
SCHNEIDER ELECTRIC		
SIEMENS		
SMITHS		
TEXAS INSTRUMENTS		
VALMET		

Orgalim Views on PFAS

What we support

- The use of **hazardous substances** should be **reduced**.
- **Emissions of hazardous PFAS** should be **limited**.
- **PFAS applications** that have caused environmental problems, and where suitable alternatives exist, shall be **controlled**.
- Other **tools to minimise identified PFAS risks** from industrial sites should be considered.

What concerns us:

- The **Green Deal will be hampered** if the use of PFAS does not remain possible where there are no substitutes available at full scale.
- A **PFAS general ban** could adversely affect our members' production and lead to economic problems.
- **Effective market surveillance** to ensure effective enforcement and a level playing field will be challenging to achieve.
- A variety of different **PFAS national measures** have recently been proposed by some EU Member States.
- **Unpredictability and uncertainty** for our industries.

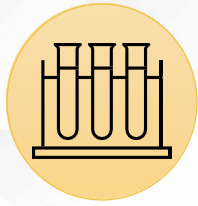
Orgalim Views on PFAS

Our recommendations

- A general ban on PFAS should not be implemented as long as substitutes for **all** uses are not recognised and not **all** uses of PFAS are reflected.
 - A **risk-based** and **substance-based** approach.
 - An **EU harmonised approach** on PFAS in products should be developed instead of national, uncoordinated measures.
 - An information obligation for "**intentionally added**" PFAS prior to restriction would allow a smoother implementation.
 - A clearly **defined procedure for derogations** is essential.
- **The repair-as-produced principle** should be applied.
 - A **general exclusion of fluoropolymers** without relevant risk is needed.
 - Under the **Essential Use Concept**, fluoropolymers should not be banned.
 - The **threshold level 25 ppb** for solid materials should be removed and replaced by a threshold level of 0.1% PFAS in the weight of the product when intentionally added in the manufacturing process

Orgalim engagement on the PFAS restriction

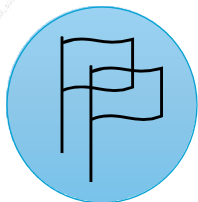
Orgalim is an active stakeholder in the ongoing process



Engagement with ECHA
and Preparation for SEAC
consultation



Dialogue with the
European Commission



National Associations
exchanges at national
level

Several Challenges to be further addressed:

- Identifying the uses of PFAS
- Identifying the alternatives to PFAS
- Managing the risks associated with the use of PFAS
- Addressing the current impacts of the proposed PFAS ban on the value chain

Orgalim products containing PFAS (with no alternatives found)

Lithium Batteries



Radar Level Measurement



Construction machinery components operating in harsh conditions



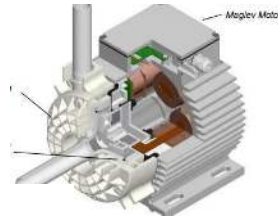
Pump Head



Professional Refrigeration Appliances



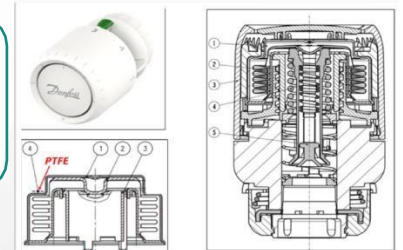
Bearingless motor technology



High-Voltage Direct Current (HVDC systems)



Ball valve for district heating and manual balancing ball valve





**Julio Mateos
Basco**
Adviser -
Environment



Any questions?



Julio.mateos@orgalim.eu



SHAPING A FUTURE THAT'S GOOD

Thank you!



www.orgalim.eu



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[Orgalim](https://www.linkedin.com/company/Orgalim)



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Universal Restriction of PFAS

Views from the digital industry

Tim Sollberger

DIGITALEUROPE

Fluoropolymers

 Product Group of Plastics Europe



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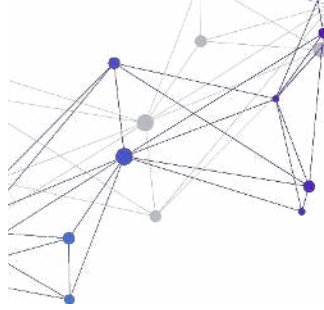
Universal restriction of PFAS

**Views from the digital
industry**

19 March 2026
Plastics Europe –
Fluoropolymers Product Group

Tim Sollberger – Senior Manager
for Sustainability Policy





European roots – global reach

Who we represent

123

GLOBAL CORPORATES



Europe
54 Corporates



Asia
24 Corporates



DC office
45 Corporates

56,000

Companies represented across full digital value chain

Cybersecurity
AI & Data economy
Telecoms
Semiconductors
Cloud technology
International trade

Resilience & defence
Healthcare
Finance
Energy
Mobility
Public Sector


44

NATIONAL ASSOCIATIONS





PFAS and electronic equipment Introduction and main issues

- 
- **DIGITALEUROPE supports the structured transition towards PFAS-free electronics**
 - The electronics and semiconductor sectors account for **<1% of PFAS use and emissions**
 - **Wide variety of uses** – many critical and currently non-replaceable applications, primarily fluoropolymers
 - E.g. Batteries, digital infrastructure (mobile telecommunications, wires/cables,...), sealings
 - Data collection on uses and alternatives is complex, global supply chains and regulatory unpredictability create **significant challenges**

Replacing all uses will take time and innovation is still needed for many applications



Exemption needed for spare parts and pre-owned articles (often no drop-in alternative)



Sufficient transition time needed for product redesign, testing and scale-up even when alternative is already known



More time if no alternative known yet (13.5 years or more, depending on application)



PFAS and electronic equipment

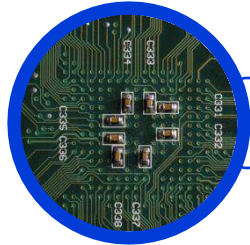
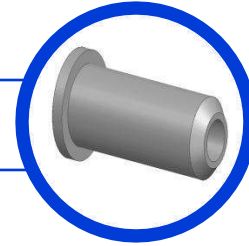
Examples in electronic equipment



Wire insulation and connectors



Mechanical applications



Printed circuit boards

Gaskets, sealings



Batteries



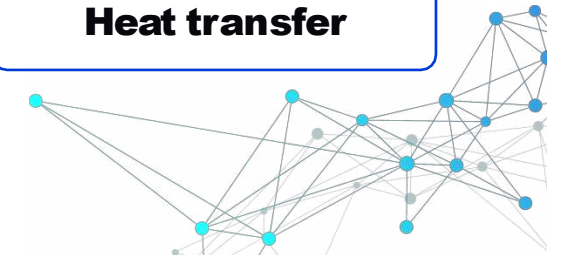
High voltage/high power applications

Components

Fire prevention





Heat transfer

And many more...





PFAS and electronic equipment Essentiality of fluoropolymers (and other PFAS)

	Durability
	Low friction
	Electrical properties
	Resistance (to temperature, UV-light, chemicals, etc.)

Especially when a combination of these properties is required, e.g. in harsh or very demanding environments, PFAS is currently the only material of choice





PFAS and electronic equipment

Example: 5G/6G mobile telecom network infrastructure equipment

▶▶ **Fluoropolymers** are used in radio amplifier, cables, antennas because of dielectric and mechanical properties

▶▶ **High frequency cables** require dimensional stability and dielectric parameters for functionality and energy efficiency

There is **no other material with the same low dielectric constant**, other materials lead to


▶▶ higher energy losses, lower bandwidth, shorter lifetime

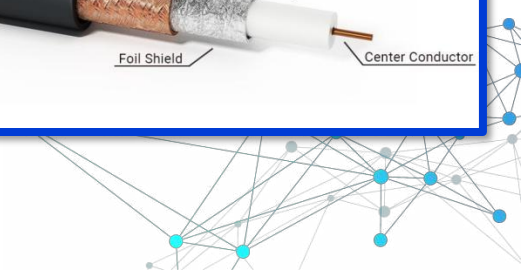
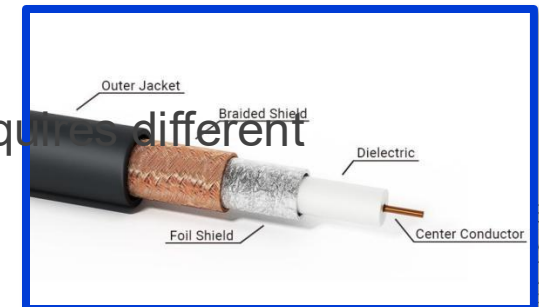
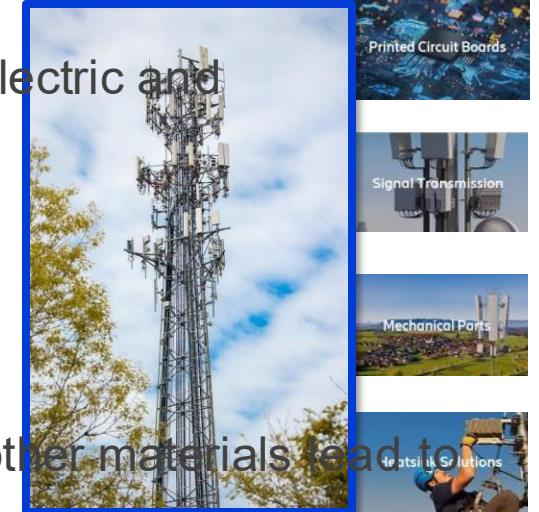


For some applications a **different material can be an alternative**, but: Requires different

▶▶  Changing standards and redesigning products takes 10–15 years

▶▶  Lack of suitable alternatives with similar properties

▶▶  Spare parts are needed long-term to maintain existing networks





PFAS and electronic equipment DIGITALEUROPE views and activities



DIGITALEUROPE 



Institutional engagement

- **Engagement with European Commission** at political and service levels (DG GROW & ENV)
- **Educational outreach** to Members of European Parliament (MEPs)
 - Emphasise need for feasibility & planning security; restriction only when maturity and scale of alternatives is proven
 - Explain realities of substitution in complex digital products



ECHA
EUROPEAN CHEMICALS AGENCY

ECHA process involvement

- **Consultation on draft SEAC opinion:** Provide additional evidence on electronics and related uses:
 - Generally positive first assessment of proposed derogations
 - Wires & cables derogation has to be expanded
 - Some improvements on reporting obligations and management plans, but still additional burden





DIGITALEUROPE 

Thank you for your attention



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Fluoropolymers

 Product Group of Plastics Europe

Semiconductor Sector

Maxime Castes

European Semiconductor Industry Association



European Semiconductor Industry Association

Semiconductor Sector







PFAS and Fluoropolymers are the Backbone of the Semiconductor Fab and Processes

-
- There are more than **1000 reported uses** of PFAS in semiconductor manufacturing, across the following 3 categories of steps:
 1. Semiconductor manufacturing equipment and infrastructure (Fluid Delivery and Interconnects, sealants/piping, waste removal, wafer handling)
 2. Process chemicals (e.g. plasma etch and wafer cleaning: clean filters, thermal insulation)
 3. In final semiconductor products (die packaging (encapsulants), specifically for MEMs)

 - Around **60%** of the above-mentioned uses correspond to fluoropolymers
 - Exclusion of fluoropolymers from scope would minimise burden associated with PFAS management plan and reduce regulatory uncertainty
 - It would also minimise costs of RO3 for semiconductors (segregation of PFAS-containing liquid wastes from lithography area, management of F-gases, and review of alternatives every 5 years)

Position of ESIA for the restriction

Electronics and
semiconductors

Applications of
fluorinated gases

Machinery

- 2 of ECHA's 15 analysed sectors were relevant for our sectors + machinery (not assessed)
- ESIA's position: time-unlimited exemption ("Risk management Option 3") aligned with derogation 5 (w) "*semiconductor manufacturing*"
 - scope of derogation 5(w) should cover the upstream (equipment) and downstream (final products) segment of the chain

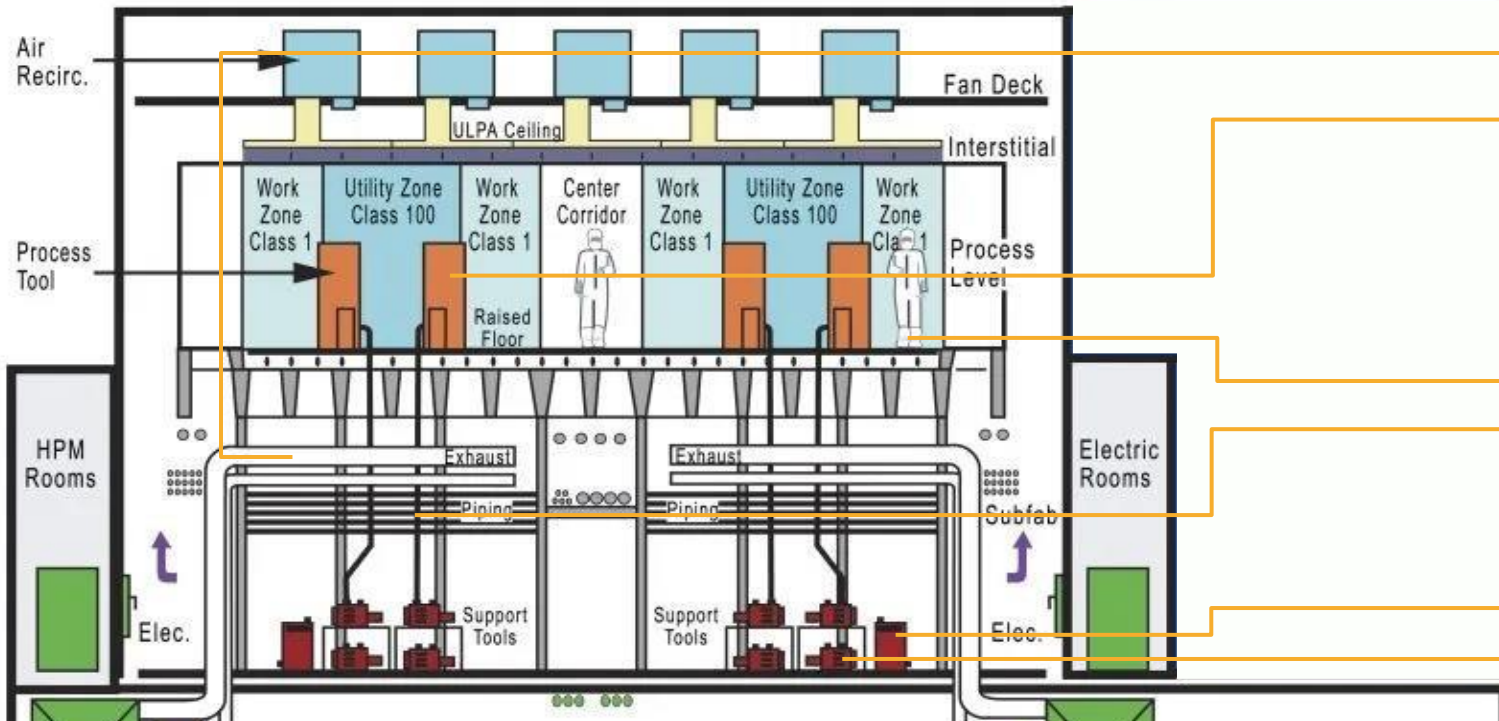
Advocacy Plan ESIA – coming months

-
- Meetings with Competent Authorities (coming months)
 - France, Netherlands, Germany, Italy, Austria →initially at technical level
 - For Germany: meeting held by Regional representation of Saxony in Brussels, with German MEPs sitting in ITRE/ENVI, and representatives from German Perm Rep`
 - German language with English translation
 - Meeting with Commission (H2 2026)
 - DG GROWDG ENV
 - Cabinet of Roswall, Séjourné, and Virkunnen
- Tie PFAS restriction with Circular Economy Act (DG ENV B3), Industrial Emissions (DG ENV B2) and Chips Act 2 (DG Connect C3)

Expectations

- Full exemption for PFAS in semiconductor manufacturing and semiconductor products on their own
- Ideally, PFAS restriction should target consumer uses in non-sealed articles (e.g., textiles, cosmetics), following model of PFHxA restriction (entry 79 Annex XVII)
- Risk management measures for industrial uses and electronics to be reinforced in horizontal legislations
 - RoHS II, WEEE, Circular Economy Act (proposal revising WEEE to be adopted end of 2026)
 - Industrial Emissions Directive (Surface Treatment of Metals BREF / semiconductor-specific BREF)
 - F-Gas Regulation

PFAS Materials are the Backbone of the Semiconductor Fab and Processes



- Exhaust Ducts
- Manufacturing Equipment:
 - seals/o-rings/gaskets
 - structural materials
 - tubes, hoses, valves, filters
 - grease
 - wire and cables
- Process chemistry
 - process chemicals
 - process gases
- Wafer Handling and Storage
- Piping systems
 - Pipes, valves, fittings, pumps
 - Tanks, vessels, and drum liners
 - Filters and membranes
 - Flow meters, sensors
- Chillers (heat transfer fluids, refrigerants)
- Vacuum pumps (vacuum oils for lubrication, grease)

The Performance-Critical Role of Fluoropolymers in Modern Electronics

Dr. Diana Radovan
Global Electronics Europe

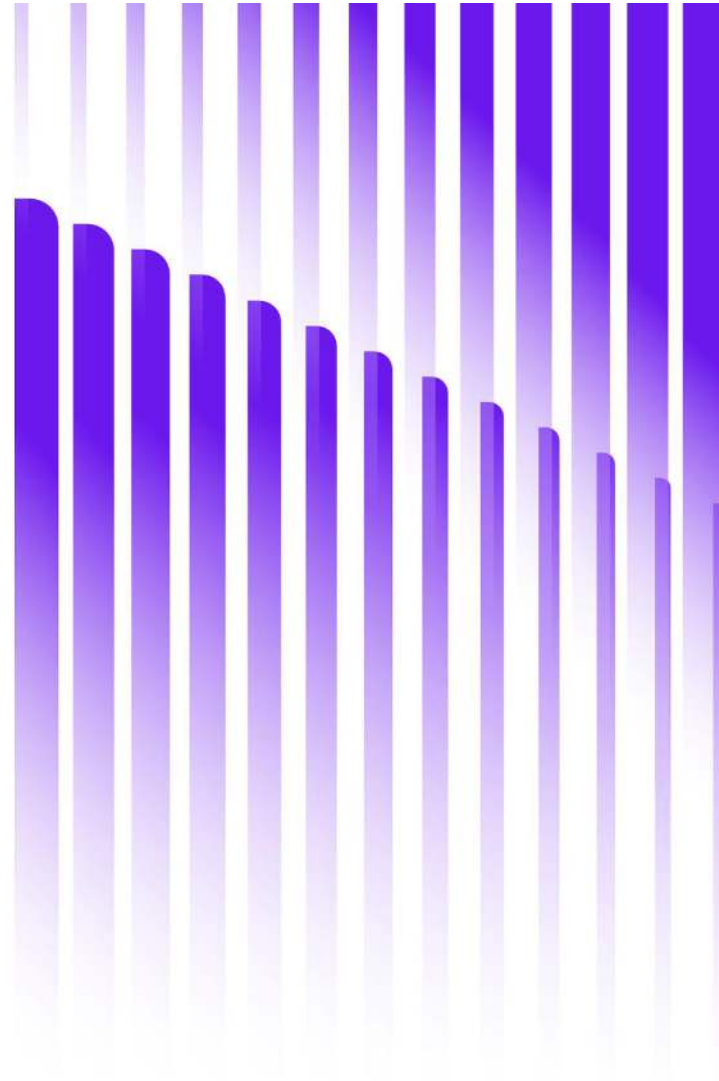
Fluoropolymers

 Product Group of Plastics Europe

The performance-critical role of fluoropolymers in modern electronics

-Dr. Diana Radovan,
Director of Sustainability Policy-

DianaRadovan@electronics.org



Who we serve

ELECTRONICS ECOSYSTEM

MAT

MATERIALS
Solder;
Chemicals;
Discrete
Components.



PCB

PCB
Board
manufacturers.



WHM

HARNESS
Connectors
and cables.



EMS

EMS
Assembly and
Manufacturing
Services.



SEM

SEMICONDUCTOR
This ecosystem
includes Fabs;
Foundries;
Substrates; OSAT



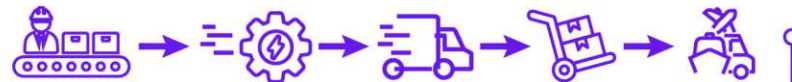
OEM

OEM/Prime
Conceives,
Designs, Delivers
the System

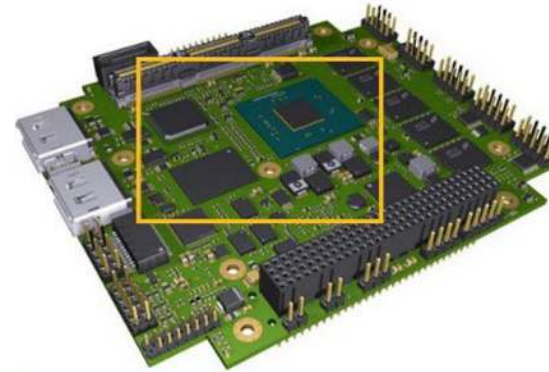
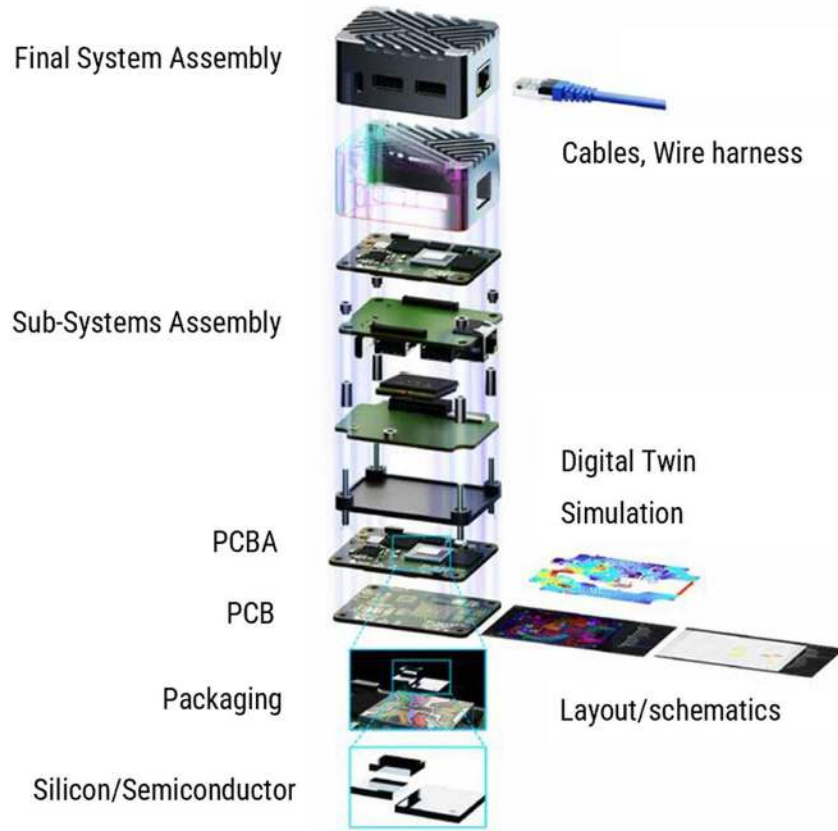


SUP

SUPPLIERS
Equipment providers automate production systems: equipment, software

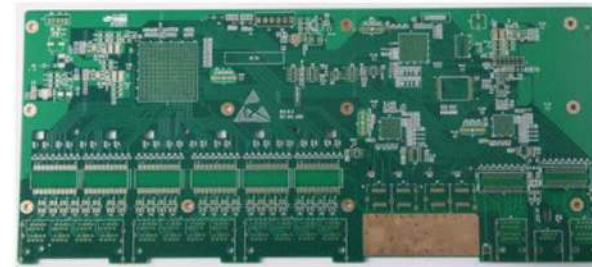


Electronics assembly: from silicon to systems



PRINTED CIRCUIT BOARD ASSEMBLY (PCBA)

Printed Circuit Board (PCB)
Electrical Components
Interconnect joining materials (solder, adhesive)



PRINTED CIRCUIT BOARD (PCB)

Multi-layer plastic laminate w/solder mask
Electrical connections - copper features and traces

Fluoropolymers are function-critical in electronics

FEATURE ARTICLE BY DR. DIANA RADOVAN, GLOBAL ELECTRONICS ASSOCIATION

A Balanced Approach
Needed to Regulate PFAS in Electronics

I-Connect007
The Global Electronics Resource

Most common fluoropolymers in electronics:
PTFE, FEP, PVDF, PVDF-HFD, PFPE, FKM, and CTFE-VDF

Unique properties:
Dielectric properties, thermal stability, inertia, durability

Where are they used in electronics?

- High-frequency PCBs
 - 5G/6G infrastructure (copper cables)
 - Telecommunication networks (fibre cables)
 - Equipment for data centres
- } Low dielectric loss – needed to maintain signal
- Semiconductor equipment } -Chemical resistance
-Plasma durability
 - Medical devices } -Proven reliability
 - Aerospace and defence } -Operational under extreme conditions

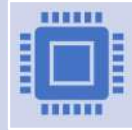
Their use in electronics is:

- Contained and highly engineered
- Currently **not replaceable** at large scale

Fluoropolymers are used broadly in thousands of electronic components

It would take decades to replace them all

The elusive alternatives (re)search



Electronics design and redesign is very complex; redesign is **not** replacing A with B



Can we replace **all** required fluoropolymers in **all** electronics today? NO







Decades of research already, because targeted, function-critical use is expensive



Very few known alternatives and usually technically inferior

- Exceptions, case-by-case, for specific electronic components
- Cannot be extrapolated to entire product classes/entire ecosystem

Preparation for the ECHA SEAC consultation

 Q3-Q4 2025	 Overall	 Current cost estimates may significantly deviate from actual figures	 Risks of restriction	 Warnings	 Key cost drivers	 Traceability and supply chain challenges	 Mapping of sectors doesn't fully reflect on-the-ground reality
<p>Cost and feasibility study</p> <p>Entire electronics ecosystem</p>	<p>Difficult to quantify the cost to the electronics industry, including by region</p>	<p>Alternatives are largely unavailable for the ecosystem and may be very expensive</p> <p>Transition times: estimated in the range of decades</p> <p>A 13-year derogation period is too short for the depth and scale of change required</p>	<p>Short-term: loss of revenue, loss of market access, and recertification delays</p> <p>Non-cost considerations: maintaining product performance, safety compliance, and meeting customer specifications</p>	<p>Significant cost pass-through to customers</p> <p>Entire product groups may become unavailable (OEMs)</p>	<p>Testing/qualification and regulatory certification</p> <p>Product/process redesign</p> <p>New equipment investments</p>	<p>Obstacles:</p> <ul style="list-style-type: none"> -Incomplete supplier data -Non-disclosure from suppliers -Insufficient analytical detection tools <p>Solutions:</p> <p>AI and digital tools are just emerging</p>	<p>Many items / sectors that are not listed as electronics and semiconductors are also electronics and semiconductors</p> <p>Some items don't become electronics until they are embedded</p>

Recent studies

US Department of Defense (DoD) Study

- Irreplaceable role today
- Generally no technically viable alternatives
- Developing alternatives could take decades, i.e. 10-25 years or longer
- Recommendations:
 - Comprehensive, phased strategy: exploring alternatives while recognising challenges
 - Need to prioritise investments, secure supply chains, and foster collaboration between government entities, industry leaders, and academic institutions



EU ITRE (Committee on Industry, Research, and Energy)

- Focus on 6 fluoropolymers: PTFE, PVDF, ETFE, FEP, PFA, and FKM/FFKM (93% of fluoropolymers used in Europe)
- Specific performances: competitiveness enablers
- Substitution is technically infeasible for most fluoropolymers in critical applications:
 - Aerospace & defence
 - Semiconductors
 - Green energy & clean technologies
- Recommendations:
 - Differentiated regulatory approach
 - Time-unlimited derogations: fluoropolymers and F-gases



Global regulatory developments



Fluoropolymers have a distinct hazard profile, with lower toxicity, reduced bioavailability, and limited environmental mobility vs. other PFAS

US, New Mexico:

Bill HB 212 exempts products containing fluoropolymers from regulatory restrictions



US, Minnesota:

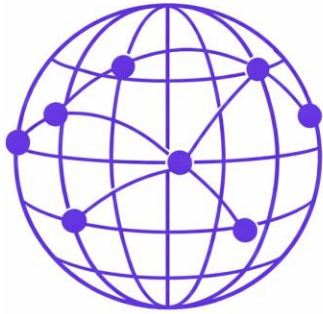
Pollution Control Agency allows for **C**urrently **U**navoidable **U**se (**CUU**) of fluoropolymers



Canada:

Risk management approach includes exemptions for fluoropolymers and F-gases

Recommendations: how to regulate fluoropolymers in modern electronics



- Safeguard planetary health while preserving the reliability and performance that modern electronics demand on the path to a successful digital and green transition
- Strong need for:
 - A proportionate, risk-based regulatory approach for fluoropolymers, with global alignment to prevent supply chain fragmentation
 - Incentives for targeted R&D, with the understanding that R&D isn't straightforward and will take decades
- Fluoropolymers have a performance-critical and currently irreplaceable function in modern electronics, with a distinct hazard profile, including lower toxicity, reduced bioavailability, and limited environmental mobility vs. other PFAS types
- Proposal: time-unlimited use of fluoropolymers in electronics in cases with no alternatives available today

Read our full position [here](#) and a recent interview in *Plastics Today* [here](#).



Q&A

REACH Restriction & FPG Updates

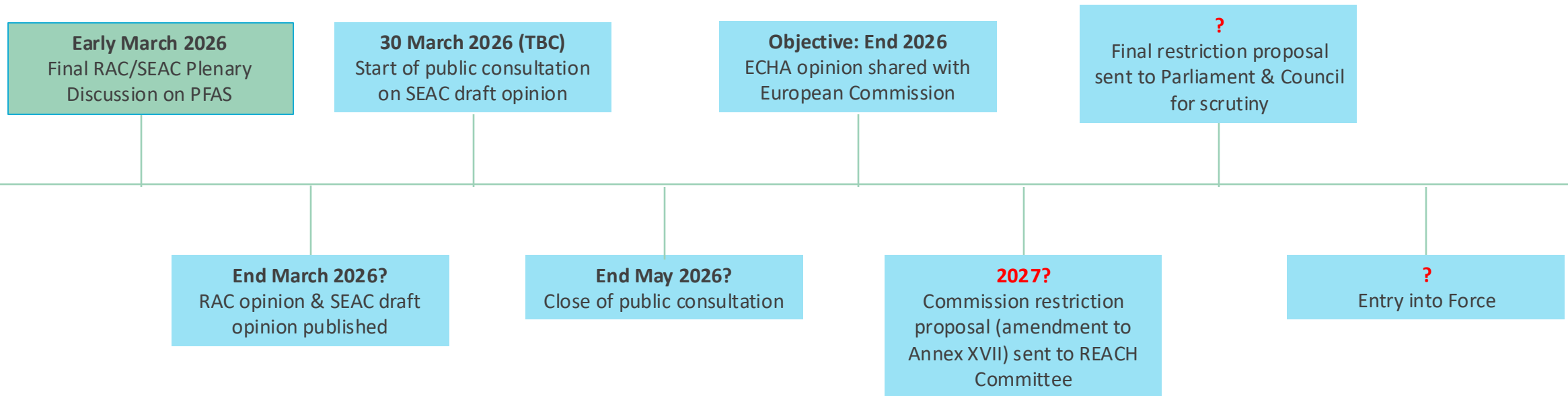
Caroline Andersson
Fluoropolymers Product Group (FPG)

Fluoropolymers

 Product Group of Plastics Europe

The PFAS REACH Restriction

- SEAC Consultation starting soon and will run for 60 days



Action Items for SEAC PFAS Draft Opinion Consultation

The second SEAC consultation is a targeted exercise to close remaining data gaps in the SEAC draft opinion.

Before submitting:

- Create an EU Login Account and set up multi-factor authentication using the EU Login mobile app
- Familiarize Yourself with the Consultation Structure
- Gather and Prepare Data
 - Consider remaining socio-economic data gaps
- Review Guidance Materials
- Identify your Sector(s) and Check Sector-Specific Guidance
- Mark your calendars and submit within the 60-day consultation window

Watch ECHA's webinar (30 October 2025)



Support & Resources:

- [ECHA Webinar](#)
- [EU Survey Support](#)
- [ECHA Contact](#)

Consultation Participation

Your participation in this consultation is crucial to achieving a proportionate outcome that protects health and the environment while safeguarding essential uses, innovation, and EU competitiveness.

Help close remaining socio-economic evidence gaps

ECHA and the dossier submitters have made the purpose of the second SEAC consultation clear:

“Key socio-economic evidence remains missing, incomplete or insufficiently specific to allow SEAC to finalise proportionality assessments.”

In practical terms, SEAC is looking for:

- Use-specific data
- Quantified or well-substantiated qualitative evidence
- Clear linkage between use → impact → restriction option

1. SEAC Consultation

- FPG is developing its response to questions targeting PFAS manufacturing and the general survey.

2. Responsible Manufacturing

- European fluoropolymer manufacturers are engaged in sustainable manufacturing, strict emissions control using the state-of-the-art technologies.

3. Sustainable End-of-Life (EoL) Management

- FPG independent report to build a comprehensive understanding of what happens in this phase at EoL. The focus is incineration and recyclability of fluoropolymers.

4. Assessment of Alternatives

- FPG independent scientific report focused evaluation of alternatives, analysing their safety, sustainability, life cycle, feasibility, and performance with the aim to contribute to the understanding on the complexities of substitution.

The Solution: A Pragmatic, Risk-Based Regulatory Focus

- **Continued use and manufacturing of fluoropolymers in all industrial and professional uses.**
- A broad, 'one-size-fits-all' restriction lacks proportionality and is doing further damage to business confidence. The [FPG calls](#) for a risk-based differentiated approach that reconciles industrial and societal resilience:
 - 1. Full Exemption and Clarity:** The PFAS restriction should provide a full exemption on fluoropolymer manufacture and uses. We need immediate clarity over the long-term future of fluoropolymers in the EU to avoid investment uncertainties.
 - 2. Regulate Emissions, Not Materials:** Since concerns about fluoropolymers relate mainly to emissions during manufacturing, processing, use, and end-of-life stages, the focus should shift entirely to regulating and implementing robust emission reduction strategies.
 - 3. Leveraging Existing Legislation:** The established framework of the **Industrial Emissions Directive (IED)** provides a mechanism for managing risks associated with emissions. The IED sets permitting conditions and emission limit values based on **Best Available Techniques (BAT/BREF)**, which provides certainty for manufacturers to align their voluntary emission reduction efforts with official EU standards.



Through 2026, FPG is hosting a series of webinars to bring together stakeholders across the fluoropolymer value chain and beyond.



By bringing together experts from use sectors, FPG aims to share insights, raise awareness of critical applications, and align sector stakeholders on responsible use and sustainable production.



The presentations from this webinar will be available shortly on the FPG website:
www.fluoropolymers.eu



Thank you

 Fluoropolymers Product Group

 <https://fluoropolymers.eu/>

Appendix

- **FPG Manufacturing Programme (MP)**
 - [FPG Statement on the Manufacturing Programme 2025 - Plastics Europe](#)
 - Slides from the September MP webinar are available here: [8-Sept-2025-FPG-presentation-for-Webinar.pdf](#)
 - Slides from the October SHG webinar available here: [20-Oct-2025-FPG-SHG-Webinar.pdf](#)
- **ECHA publication 20 August 2025, Updated PFAS restriction proposal (Draft Background Document)**
 - <https://echa.europa.eu/-/echa-publishes-updated-pfas-restriction-proposal>
- **ECHA update on the timeline for the evaluation of the proposal**
 - [6775e241-204e-af0a-a2d0-4c16ba2c138d](#)
- **FPG Statement on ECHA's Updated PFAS Background Document**
 - <https://fluoropolymers.eu/2025/08/27/fluoropolymers-recognised-fpgs-statement-on-echas-updated-pfas-background-document/>
- **FPG Statement, call for clarity**
 - <https://fluoropolymers.eu/2025/07/10/fpg-calls-for-clarity-on-fluoropolymers/>
- **FPG Safe Handling Guide**
 - [Guide for the Safe Handling of Fluoropolymer Resins](#)