

Socio-Economic Assessment Study

Fluoropolymers and the European economy

Small input, massive impact: fluoropolymers are usually small components, but perform functions that are critical to performance, reliability, durability and regulatory compliance across strategic European value chains.



1. Rising Risk of Import Dependence

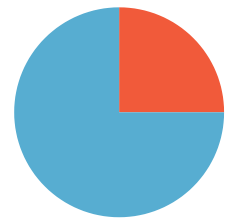
The EU's 56,500 tonnes fluoropolymer market is becoming increasingly reliant on non-EU supply. And restrictions that weaken EU production could deepen this strategic vulnerability.

2020

38% non-EU supply

↘
2025

~75% non-EU supply



Today non-EU imports account for 75% of domestic demand



2. Europe's Manufacturing Output

Every €1 of direct fluoropolymer output supports €2.61 across the broader EU economy.

Direct Impact:



€620m

of economic output from manufacturers



2,800

manufacturing jobs

Indirect Impact:



€1.6bn

when supply-chain and wage-spending effect accounted



14,500

jobs created



3. Impact of a Ban on the Value-Chain



€330bn

of output in the transport sector



€9bn

of energy-related output



€20bn

of sealing related output



800k+

jobs across quantified areas

Even with derogations ~€173bn output and 386,500+ jobs would remain exposed

Conclusion

A full exemption of fluoropolymers from any blanket restriction is the only proportionate regulatory outcome to avoid significant industrial consequences.