

Press release

New Study Finds Fluoropolymers Support Hundreds of Billions of Euros in Strategic European Industrial Output

Brussels, 10 June 2026 – A new study prepared by Europe Economics and commissioned by the Fluoropolymers Product Group (FPG) finds that restricting fluoropolymers would have significant consequences for strategic European value chains in transport, clean energy and advanced manufacturing. **Across transport and energy alone, fluoropolymer-dependent applications are associated with approximately EUR 339 billion in output and nearly 752,100 full-time jobs across the EU27.** A further EUR 20 billion in output and 54,900 full-time jobs are associated with cross-cutting sealing applications, while semiconductors, electronics, medical and broader industrial uses are not quantified, meaning the full economic stake is significantly larger.

The study, the third in a series of FPG publications, builds upon a comprehensive evidence base in support of proportionate PFAS regulation, reinforcing the case for a full exemption of fluoropolymers from any blanket restriction under REACH. The latest study assesses the socio-economic importance of fluoropolymers from two perspectives: the economic footprint of EU fluoropolymer manufacturing, and the scale of downstream industrial activity that may be exposed where access to fluoropolymers is restricted. It draws on aggregated data from all major EU27 fluoropolymer producers, Eurostat input-output tables and UN Comtrade import statistics.

The direct economic footprint of EU fluoropolymer **manufacturing** stands at approximately **EUR 620 million of output and 2,800 full-time jobs**. Once supply-chain and wage-spending effects are accounted for, **the total economy-wide footprint rises to approximately EUR 1.6 billion of output and 14,500 full-time jobs**. **Each euro of direct fluoropolymer output supports approximately EUR 2.61 of output across the broader EU economy.** In many applications, fluoropolymers account for a small share of input value but perform functions that are critical to downstream product performance, reliability and compliance. Judging their economic importance by sales figures alone fundamentally misrepresents their role.

Alarmingly, the study also finds **that the EU is already heavily dependent on non-EU fluoropolymer supply**. Domestic production covers only around one quarter of the EU market, with non-EU sources accounting for approximately three quarters, up from around 38% in 2020. **Any regulatory measure that further undermines EU production viability would deepen a strategic vulnerability that is already significant.**

“This study puts a concrete number on what is at stake,” says Caroline Andersson, Director of FPG. **“Fluoropolymers are embedded in the value chains that power European transport, clean energy and advanced manufacturing. Restricting them is an industrial policy decision that would have profound impact on the European economy. The evidence demands a full exemption.”**

The findings of this study, combined with the limitations of deploying alternatives demonstrated by the [Assessment of Alternatives](#) and the effective end-of-life management confirmed by the [End-of-Life report](#), reinforce FPG's call for a full exemption of fluoropolymers from any blanket restriction under REACH.

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About Fluoropolymers Product Group (FPG):

The FPG is part of Plastics Europe, the industry association representing European polymer producers. It operates in accordance with Plastics Europe governance rules, including Competition Compliance rules. Plastics Europe covers the EU, plus UK, Norway, Turkey and Switzerland.

About Fluoropolymers:

Fluoropolymers are advanced materials that provide unmatched durability, chemical and thermal resistance, and stability in extreme environments. Their unique set of properties makes them essential in many industries, from healthcare and renewable energy, to transportation, aerospace and semiconductors.