PFAS olve

SECTOR OVERVIEW · INSERT TO THE PARTNER FOLDER

Everyone is affected. Everyone is needed.

Those who cause, inherit, manage or insure PFAS contamination – and those who earn from removing it: 94 sectors and stakeholder groups in nine clusters.

PFAS know no sector boundaries.
The question is not whether you are affected – but how, and whether you help shape the solution.

CAUSE & APPLY
Chemicals, agrochemicals, materials, manufacturing, high technology, defence technology

INHERIT & OPERATE
Sites, airports, properties, water, wastewater, waste management

SOLVE & SUPPLY
Plant engineering, waste companies, diagnostics, sensors, analytics, engineering

SECURE & ENABLE
Financial sector, insurers, public sector, NGOs, global partners

94

sectors and stakeholder groups with typical PFAS touchpoints

5

building blocks of the solution chain from which every sector benefits

≈ 2

companies per sector are arithmetically enough to reach the target of 200 members

OVERVIEW

Nine clusters – from cause to solution

PFAS affect far more companies and organisations than just those who manufacture or use them: for 94 sectors and stakeholder groups, this overview shows where PFAS touch their own business and what benefits participation in PFAS-SOLVE brings.

A Chemicals, Materials & Formulation

CAUSE & APPLY · 10

Manufacture, processing, formulations and crop protection – start of the emission pathways and focus of regulation.

B Industrial Manufacturing & High Technology

APPLY · 19

Seals, membranes, cables and process chemistry in almost every high technology.

C Food, Agriculture & Consumer Goods

AFFECTED VIA WATER, SOIL AND SUPPLY CHAIN · 9

Rarely users, but bearers of the marketing risk via water, soil, feed and packaging.

D Sites, Infrastructure & Fire Protection

INHERIT & OPERATE · 10

Fire-fighting foam and historical uses: operators are liable for inherited land.

E Water, Wastewater, Waste & Circular Economy

OPERATE & APPLY SOLUTIONS · 11

Where all emission pathways converge – affected parties, users and test sites at once.

F Defence, Security & Civil Protection

INHERIT, OPERATE & APPLY · 5

Military and fire brigade facilities and training grounds are among the most heavily contaminated sites.

G Solution Providers, Technology & Services

SOLVE & SUPPLY · 15

Every contamination is a market: plants, tests, materials, disposal and engineering.

H Finance, Insurance, Law & Advisory

SECURE & ASSESS · 6

PFAS risks travel via loans, policies and transactions onto balance sheets.

I Public Sector, Civil Society & Global Partners

PROTECT & ENABLE · 9

A global problem with the largest gaps where laboratories and budgets are lacking.

> **No blanket contamination, no blanket liability**
>
> We list typical touchpoints and possible consequences, not a contamination of every company in a sector.[1] What matters are the substances used, the site history and the actual emission pathways – and that is exactly why reliable detection is needed.

Roles in PFAS-SOLVE – how to read the labels

Member Full member (Founding, Strategic, Core, Associate Members)

Scientific Scientific Partner – science and host institution

Technology Technology Partner – processes, materials, sensors, engineering

Application Application & Demonstration Partner – samples, waste streams, sites

Scale-up Project & Scale-up Partner – pilot and demonstration projects

Supporting Supporting member – foundations, associations, supporters

Roles can be combined. Publicly controlled institutions participate as programme partners, extraordinary or supporting members; as full members, together they hold less than 20 % of the votes.

Sources: 1 Glüge, J. et al.: An overview of the uses of PFAS. Environ. Sci.: Processes & Impacts 22 (2020)

CLUSTER A · CAUSE & APPLY

A Chemicals, Materials & Formulation

Those who manufacture or process PFAS, or use them in their processes, stand at the start of the emission pathways – and at the centre of regulation, liability and customer requirements. This also applies to fluorinated crop protection substances, whose breakdown product TFA is increasingly found in groundwater.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Chemical and fluorochemical industry Member Application	Manufacture and processing of PFAS; process wastewater, emissions and legacy sites	Robust processes for wastewater, exhaust-air scrubbers and site remediation; evidence for authorities and the public
Crop protection and agrochemical manufacturers Member Application	Fluorinated active substances degrading to TFA in groundwater; production wastewater, legacy sites, old stock after authorisations are withdrawn[10]	Analytics for active substances and breakdown products in soil and water; wastewater treatment; take-back and destruction of old stock
Plastics, rubber and fluoropolymer processing Member Application	Fluoropolymers, processing aids, release agents; production waste	Treatment of process water and waste; security for customers and permits
Paints, coatings, adhesives, construction chemicals Member	Fluorinated additives and functional coatings; rinsing and cleaning water	Analytics for formulations and compliance evidence; treatment of residues
Lubricant and specialty fluid manufacturers Member Technology	PFPE lubricants, hydraulic and heat-transfer fluids; take-back and spent fluids	Safe take-back and destruction routes for legacy stock; proof of destruction
Fire-fighting foam manufacturers and fire protection Member Technology Application	Switch to fluorine-free foams; legacy stock, contaminated tanks, pipework and vehicles[4]	Cleaning and disposal solutions for conversions as a service line of its own
Chemical trading and distribution Member	Storage, decanting, take-back and declaration of PFAS-containing products	Rapid tests in goods inspection; orderly take-back and disposal routes
Cosmetics and personal care industry Member	PFAS in certain ingredients and formulations	Test methods for raw materials and products; evidence for retailers and consumers
Cleaning product manufacturers and facility services Member	Specialty cleaners, polishes, floor care, impregnation agents; wastewater	Product testing and wastewater evidence for commercial clients
Printing, photographic and coating applications Member	Fluorinated surfactants and functional layers in printing and specialty applications[9]	Process water treatment, analytics

Sources: 4 Regulation (EU) 2025/1988 of 2 October 2025 (PFAS in fire-fighting foams) · 9 ECHA/EMA: Next steps in the ECHA assessment of the PFAS universal restriction – eight additional sectors · 10 Commission Implementing Regulation (EU) 2025/910 of 20 May 2025 (non-renewal of flufenacet due to TFA in groundwater)

CLUSTER B · APPLY

B Industrial Manufacturing & High Technology

PFAS are found in the seals, membranes, cables and process chemistry of almost every high technology. Where they remain indispensable, emissions must be controlled; where they are replaced, residues remain.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Metalworking, electroplating and surface technology Member Application	Wetting agents and mist suppressants in process baths; contaminated rinse water and sludge	Compact separation and destruction right at the bath; compliance with discharge limits
Semiconductor and printed circuit board industry Member Application	Photolithography, process chemicals, high-purity functional materials	Cleanroom-scale wastewater treatment; online monitoring to safeguard production
Electrical engineering, electronics and cable manufacturing Member	Insulation, coatings, fluorinated component materials	Material testing, supply-chain evidence and treatment of production waste
Data centres and IT cooling Member Application	Fluorinated immersion and heat-transfer fluids; requalification after 3M's exit at the end of 2025[6]	Safe draining, take-back and destruction of spent fluids; leak monitoring
Automotive industry and suppliers Member	Seals, hoses, lubricants, cables, surfaces	Safeguarding plants and paint shops; analytics for approvals and supplier audits
Rail vehicle, ship and boat building Member Application	Coatings, seals, cables; onboard extinguishing systems with PFAS foam[4]	Cleaning and conversion of onboard systems; treatment of shipyard and rinse water
Aerospace industry Member	High-performance seals, lines, coatings, specialty fluids	Emission control for materials that cannot be replaced for years; site security
Machinery, plant and equipment manufacturing Member Technology	Seals, bearings, membranes, linings, lubricants	Dual role: affected party and future supplier of treatment plants
Power generation, photovoltaics, wind and grids Member Application	Fluorinated films, cables, seals; end-of-life modules and components	Recycling and decommissioning routes; treatment of fire-fighting water after fires at installations
Battery manufacturing and battery recycling Member Application	Fluorinated binders and electrolyte components; recycling fractions	Process water treatment and low-PFAS recycling fractions as a market advantage
Hydrogen and fuel cell technology Member	Fluorinated membranes and seals; take-back of used stacks	PFAS-free recycling routes for membranes; emission evidence as a basis for permits
Refrigeration, air-conditioning and heat pump technology Member	Certain fluorinated refrigerants and heat-transfer media; recovery	Destruction routes for recovered refrigerants; keeping breakdown products in view
Pharmaceutical industry and industrial biotechnology Member Scientific	Fluorinated active ingredients and building blocks; membranes, tubing, reactor components	Wastewater treatment under GMP; biological and enzymatic approaches as a field of its own
Medical technology, diagnostics and healthcare facilities Member Technology	Catheters, implant components, membranes, protective materials; hospital wastewater	Validated test methods; diagnostics manufacturers also as future solution providers

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Textile, leather, footwear and outdoor industry Member Application	Water-, oil- and stain-repellent finishes, membranes; process wastewater	Wastewater solutions also for production sites in non-European supply chains
Industrial laundries and textile services Member Application	Finishes on work, protective and functional textiles; laundry wastewater	Compact wastewater stages; evidence for municipalities and customers
Paper, board and packaging manufacturing Member Application	Grease- and water-repellent finishes; process water and residues	Compliance evidence since August 2026; treatment of circulating water
Recycled paper and fibre processing Member Application	Input of former coatings via waste paper; paper sludge	Testing of secondary fibres; treatment of circulating water
Furniture, carpet and floor covering industry Member	Soil- and stain-repellent finishes on textiles and floor coverings	Raw material testing, legacy stock, disposal during demolition

Sources: 6 3M: 3M to Exit PFAS Manufacturing by the End of 2025 (20 Dec 2022) · 4 Regulation (EU) 2025/1988 of 2 October 2025 (PFAS in fire-fighting foams)

CLUSTER C · AFFECTED VIA WATER, SOIL AND SUPPLY CHAIN

C Food, Agriculture & Consumer Goods

Those who produce or sell food have rarely used PFAS – but bear the marketing risk when water, soil, feed or packaging are contaminated.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Food production, commercial kitchens and catering Member Application	Raw materials, water, contact materials, coated process equipment	Fast, low-cost incoming-goods and water testing; supplier evidence
Beverage producers, breweries, mineral water bottlers Member Application	Spring, well and process water from own water supply	Monitoring and treatment to protect the brand
Agriculture, horticulture and livestock farming Member Application	Contaminated soils, irrigation water, feed, previously applied sewage sludge or sludge compost; TFA from fluorinated pesticides[11]	Affordable field tests; processes for contaminated land and water; evidence for buyers
Fisheries, aquaculture and pond farming Application	Inputs via surface water and groundwater; accumulation in fish	Water monitoring and treatment of intake water
Feed and fertiliser manufacturers Member	Raw materials, sewage-sludge- and compost-based fertilisers	Incoming inspection and quality evidence; treatment of contaminated batches
Restaurants, hotels and chain catering Member Supporting	Food-contact packaging, non-stick finishes, own wells	Simple test methods for purchasing and own water supply
Sporting goods manufacturers, ski rental and wax services Member	Fluorinated waxes, legacy stock, residues in service areas	Cleaning, occupational safety and disposal of legacy stock
Sports venues, artificial turf and leisure facilities Application	Possible fluorinated processing aids; drainage and surface water	Test methods for surfaces and run-off water

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Wholesale and retail, importers, brand owners Member	PFAS in purchased goods and private labels; take-back and liability issues	Rapid tests in the supply chain; credible evidence for customers

Sources: 11 EEA: PFAS pollution in European waters

CLUSTER D · INHERIT & OPERATE

D Sites, Infrastructure & Fire Protection

Decades of fire-fighting foam use and historical activities have left PFAS-contaminated land whose operators are liable today – regardless of who once used the substances.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Fire brigades, fire training schools, fire protection services Application · Supporting	Fluorinated fire-fighting foams; training grounds, equipment cleaning, legacy stock[4]	Conversion, cleaning and disposal; rapid tests after incidents
Airports, airfields and aviation infrastructure Member · Application	Fire training grounds, incident areas, past foam use	Soil and groundwater remediation; handling contaminated excavated soil during expansion
Refineries, tank farms, chemical parks, Seveso sites Member · Application	Fixed extinguishing systems and foams; PFAS foam still permitted there until 2035[4]	Preparedness for incidents; treatment of rinse and fire-fighting water
Mining, raw material extraction, oil and gas production Member · Application	Process and production aids, fire-fighting foams, also on offshore installations	Process water treatment and site aftercare, also at remote locations
Ports, shipping companies and maritime logistics Member · Application	Onboard extinguishing systems, fire drills, harbour silt and dredged material	Treatment of bilge, rinse and dredging water; fleet conversion
Road, tunnel and rail infrastructure Member · Application	Extinguishing systems, major fires and accident sites with foam use; embankments, excavated soil	Rapid situation assessment after incidents; recovery routes for excavated soil
Ski resorts, slope and trail operators, winter sports Member · Application	Fluorinated ski waxes in snow, soil and meltwater	Monitoring of water resources; remediation options; reputation
Municipalities, tourism and leisure infrastructure Application · Supporting	Municipal land, own water supply, bathing waters, sports facilities	Reliable decision-making basis and trust among residents and guests
Property owners, project developers, business parks Member · Application	Historical uses and contaminated land; transactions	Rapid assessment in acquisition and development; predictable remediation costs
Construction, civil engineering and excavated soil recovery Member · Application	Contaminated building ground, excavated soil, dewatering	On-site analytics to prevent construction delays; processes for construction water and excavated soil

Sources: 4 Regulation (EU) 2025/1988 of 2 October 2025 (PFAS in fire-fighting foams)

CLUSTER E · OPERATE & APPLY SOLUTIONS

E Water, Wastewater, Waste & Circular Economy

This is where all emission pathways converge. These operators are at once affected parties, the most important users and natural test sites for the solution chain.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Drinking water suppliers and operators of private wells Member Application	External inputs into catchments and raw water, including TFA from agriculture; monitoring obligations[11]	Low-cost monitoring and treatment with small concentrate volumes
Municipal and industrial wastewater treatment Member Application	PFAS in influents, effluents and sewage sludge	Additional treatment stages and source identification in the catchment
Sewage sludge recovery and phosphorus recovery Member Application Technology	Incineration, land application, recovery from contaminated sludge	Proof of destruction; PFAS-free recyclates as a product
Landfills and leachate treatment Member Application	PFAS-containing legacy waste, long-term release via leachate	Treatment and concentrate destruction over decades of aftercare
Thermal waste and hazardous waste treatment Member Technology Application	PFAS-containing waste and concentrates; flue gas, scrubber water, residues	Proven destruction performance as market access – operator and provider at once
Cement plants and co-incineration Member Technology Application	High-temperature co-incineration of PFAS-containing waste and concentrates	Proof of destruction and emission control as a new business field
Plastics, textile and other recycling operations Member Application	PFAS in input material and processing residues	Testing of recyclates, wash water treatment, marketability
Waste electrical and electronic equipment recycling Member Application	Fluorinated cables, components and refrigerants in end-of-life equipment	Safe fractionation and destruction routes; raw material quality
Composting, biogas, organic residue recovery Member Application	Inputs via feedstocks and packaging residues	Quality testing of compost, digestate and process water
Contaminated site remediation, soil washing, land recycling Member Technology Application	Contaminated soils, groundwater and washing fractions	More effective and lower-cost processes with proven remediation success
Industrial and tank cleaning Member Technology	Cleaning of foam-exposed systems, tanks and pipework; rinse water	Effective cleaning during conversions; treatment of cleaning water

Sources: 11 EEA: PFAS pollution in European waters

CLUSTER F · INHERIT, OPERATE & APPLY

F Defence, Security & Civil Protection

Military airfields and training grounds are among the most heavily contaminated sites. At the same time, PFAS remain permitted for longer in defence technology – emissions and residues must be controlled there.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Military sites, training and conversion areas Application · Scale-up	Airfields, fire training grounds, fire stations; handover and reuse[2,3]	Site investigation, groundwater protection, remediation and recovery of demolition material
Defence and armaments industry Member · Application	Ammunition, explosives, decoys, electronics, membranes[5]	Emission control in production and testing; legacy contamination at plants and test ranges
Navy, coast guard and government fleets Application · Scale-up	Onboard extinguishing systems; PFAS foam permitted on military vessels until 2035[4]	Plannable draining, cleaning and destruction during conversion
Protective equipment for armed forces and emergency services Member · Application	Functional textiles and impregnations for military, police, rescue services[5]	Laundry and re-impregnation wastewater; take-back of decommissioned equipment
Civil protection, disaster relief, police, rescue services Application · Supporting	Incident areas after major fires; emergency water supply	Field-ready rapid tests and mobile treatment for emergency operations

Defence: the largest individual sites – and a need of its own

164

Germany: Bundeswehr sites suspected of PFAS contamination, around 15 % of all sites – almost exclusively due to fire-fighting foams (as of Q1 2024)[2]

723

US military installations under PFAS investigation; USD 10.2 billion earmarked for investigation and remediation (as of March 2025)[3]

2035

PFAS foam remains permitted on military vessels until October 2035 – conversion can be planned[4]

Field-ready rapid tests and mobile, low-energy treatment are as much in demand for field camps, deployments and disasters as they are for civilian operators.

Sources: 2 Düker: PFAS-Bearbeitung auf Liegenschaften des Bundes, expert presentation (2024, German) · 3 U.S. Department of Defense: Assessment and Remediation Plan, as of 31 March 2025 · 4 Regulation (EU) 2025/1988 of 2 October 2025 (PFAS in fire-fighting foams) · 5 European Parliament: PFAS and their role as enablers in the competitiveness of EU industry (2025)

CLUSTER G · SOLVE & SUPPLY

G Solution Providers, Technology & Services

Every contamination is also a market. Those who help shape operators' requirements and have access to real waste streams and pilot sites will later supply the plants, tests and services.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Water and wastewater plant construction, EPC, general contractors Member · Technology · Scale-up	Design, construction and operation of treatment plants	Early access to processes, performance data and pilot sites; integration into existing plants

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Manufacturers of modular and mobile treatment systems Member Technology	Containerised solutions for construction sites, emergencies and remote locations	Validated treatment trains for decentralised markets, defence and humanitarian missions
Adsorbents, activated carbon and ion exchangers Member Technology	Manufacture, supply and regeneration of sorbent materials	Functionalised materials, regeneration and residue routes
Membrane, filtration and separation technology Member Technology	Nanofiltration, reverse osmosis, foam fractionation	Concentrate treatment as the key to marketability
Destruction technology and reactor construction Member Technology Scale-up	Electrochemical, thermal, photochemical, plasma and supercritical processes	Common verification standard, fluorine mass balances, scale-up in continuous operation
Electrode, catalyst and materials manufacturers Member Technology	Electrodes, catalysts, corrosion-resistant reactor materials	Requirements from real waste streams; service life and cost in continuous operation
Waste management and hazardous waste companies Member Technology Application	Collection, logistics and treatment of PFAS-containing waste and concentrates	Growing volumes from conversions and treatment; proven destruction
Remediation, environmental and geotechnical companies Member Technology Application	Well construction, pump-and-treat, in-situ processes, soil washing	More efficient processes and proven remediation success
Analytical instrument manufacturers and laboratory suppliers Member Technology	Mass spectrometry, fluorine mass balances, sample preparation	New methods and sum parameters; reference materials
Diagnostics, sensor and rapid test manufacturers Member Technology	Biosensors, multiplex systems, photometric or electrochemical on-site tests	Direct path from detection to products; building blocks usable early on
Measurement, automation and online monitoring technology Member Technology	Fixed monitoring points, sampling, process control systems	Live monitoring at discharges, water abstraction points, sewage plants and treatment plants
Digital environmental data, AI and modelling Member Technology	Dispersion models, digital twins, data platforms	AI-supported analysis and decision support for operators
Biotechnology, enzyme and microbiology companies Member Technology Scientific	Enzymatic and microbial approaches from adsorption to defluorination	Biological treatment stages for low-energy, decentralised applications
Analytical laboratories, testing institutes and certifiers Member Technology	Detection, site assessment, performance and conformity testing	Rising requirements for measurement methods and robust performance evidence
Engineering firms, environmental consultancy, permit planning Member Technology	Site assessment, design, permitting procedures	Comparable performance data and permittable treatment trains

Those who help write the requirements will later supply the solution

- Access to real waste streams, operating data and pilot sites of the members – instead of laboratory samples
- A common verification standard for destruction and effectiveness against which solutions will be measured
- Knowledge advantage over non-participating competitors; licensing and market launch are part of Implementation
- Operators from more than 90 sectors as future customers – at one table, with concrete problems

CLUSTER H · SECURE & ASSESS

H Finance, Insurance, Law & Advisory

PFAS risks travel via loans, policies, equity stakes and transactions onto the balance sheets of the financial sector. Those who know the solutions can assess risks – and limit them.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Banks and project financiers Member Scale-up	PFAS risks in financed companies and properties	Quantifiable follow-up costs; financing of remediation and treatment plants
Insurers and reinsurers Member Scale-up	Coverage issues, liability and environmental damage, provisions	Predictable remediation costs; loss limitation through effective processes
Investors, private equity, venture capital, family offices Member Scale-up	PFAS legacy liabilities in the portfolio; new technology markets	Due diligence know-how and early insight into emerging solution providers
Transaction advisers, auditors, appraisers Member	Valuation of contaminated sites, provisions and warranties	Robust cost and process basis for valuations
Legal advice and liability management Member	Official orders, damages, directors' liability	State of the art as benchmark; documented options for action
Sustainability and risk reporting, ratings Member	Disclosure of environmental risks and contaminated sites	Comparable indicators and credible measures

CLUSTER I · PROTECT & ENABLE

I Public Sector, Civil Society & Global Partners

PFAS are a global problem – with the largest gaps where laboratories, infrastructure and budgets are lacking. Robust, affordable and decentralised solutions from PFAS-SOLVE are particularly valuable here.

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Authorities, environmental agencies, regional and federal administrations Application Supporting	Enforcement, monitoring, orders and evaluation of remediation	Reliable processes as state of the art; comparable evidence
Industry associations, chambers and clusters Supporting	Information and representation of affected member companies	Multipliers for sector solutions and shared use cases
Environmental, health and consumer protection NGOs Supporting Application	Public information, measurement campaigns, interests of affected communities	Independently verifiable proof of effectiveness; solutions instead of bans

SECTOR · STAKEHOLDER GROUP	TYPICAL PFAS TOUCHPOINTS	INTEREST IN PFAS-SOLVE
Foundations and philanthropic donors Supporting · Scale-up	Funding of environmental, water and health projects	Leverage on an industry-funded programme; projects for those in need
Universities and research institutions Scientific	Scientific expertise, laboratories, pilot plants	Host institution for embedded teams; application of own research
Development cooperation and development banks Scale-up	Water and infrastructure projects in emerging and developing countries[7]	Financing of defined pilot and demonstration projects on the ground
Humanitarian organisations and WASH actors Application · Supporting	Water supply in camps, crisis and disaster areas	Field-ready rapid tests and robust, low-energy treatment
Production sites in the Global South Application · Scale-up	Textile, leather, electronics and e-waste processing in supply chains[7]	Wastewater solutions and supply-chain evidence for European buyers
Remote regions, islands and island grids Application	Own wells, mountain huts, mountain and research stations without laboratory access	Decentralised, low-maintenance detection and treatment

Global South, crisis regions, remote locations

5–20×

higher PFAS concentrations at contamination hotspots in low- and middle-income countries than in the Global North – with patchy monitoring and low treatment coverage[7]

up to 778 ng/l

PFAS in drinking water sources studied in Africa; most existing treatment plants do not remove PFAS effectively[8]

Affordable rapid tests and robust, low-maintenance treatment are especially valuable here – and a sales market for the solution providers in PFAS-SOLVE.

Sources: 7 From global north to south: governing contaminants of emerging concern. Environ. Res. Lett. (2026) · 8 PFAS contamination of drinking water sources in Africa. Chemosphere 365 (2024) 143368

SHARED BENEFIT

One solution chain – for all clusters

The applications differ, but the core technical tasks recur. Every cluster benefits from several building blocks at once – those who develop alone bear the full cost and all of the risk.

CLUSTER	DETECTION	CONCENTRATION	ELIMINATION	VERIFICATION	IMPLEMENTATION
A · Chemicals, Materials & Formulation	○	●	●	●	○
B · Industrial Manufacturing & High Technology	●	●	●	○	●
C · Food, Agriculture & Consumer Goods	●	○		○	○
D · Sites, Infrastructure & Fire Protection	●	●	●	●	●
E · Water, Wastewater, Waste & Circular Economy	●	●	●	●	●
F · Defence, Security & Civil Protection	●	●	●	○	●
G · Solution Providers, Technology & Services	●	●	●	●	●
H · Finance, Insurance, Law & Advisory	○			●	○
I · Public Sector, Civil Society & Global Partners	●	○	○	●	●

● Focus of interest ○ relevant Assessment by PFAS-SOLVE

200 members ÷ 94 sectors ≈ 2 companies per sector

Illustrative calculation: 200 companies × EUR 50,000 per year × 10 years = EUR 100 million funding target.

Everyone is affected. Everyone should contribute.

Those who join early bring their own challenges into the start-up programme – and share cost and risk with everyone else.

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