

PFAS SERIES — ARTICLE 3 OF 6



Europe's PFAS Crackdown



Source bans, treatment standards & what they mean for water professionals globally



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Source bans, drinking water standards, and what they mean for water professionals globally

There is an important distinction that water professionals worldwide need to understand about Europe's approach to PFAS — and it is one that is frequently confused in media reporting and industry discussions.

The EU is not simply tightening drinking water treatment standards. It is pursuing a fundamentally different strategy: attacking the problem at its source by restricting the manufacture and use of PFAS in products, while simultaneously setting strict limits on what utilities must deliver at the tap. These are two separate and parallel regulatory streams, operating on different timelines, through different legal mechanisms, and with different implications for different parts of the water sector.

Understanding both streams — and how they interact — is essential for any water professional operating in or supplying to European markets.

The EU is pursuing the most comprehensive PFAS restriction ever attempted globally — covering all 10,000+ PFAS compounds across all sectors. The final ECHA opinion is expected by end of 2026, with European Commission legislation following in 2027.

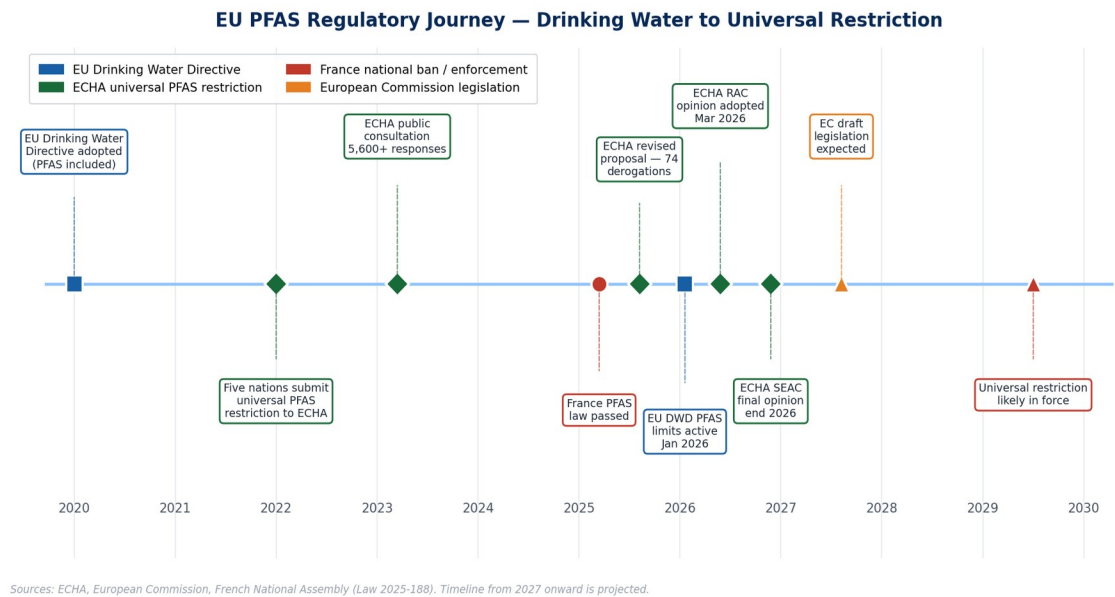


Figure 1: EU PFAS regulatory journey — from the Drinking Water Directive to the universal REACH restriction. Sources: ECHA, European Commission, French National Assembly.

Stream 1: Drinking water standards — already in force

The first regulatory stream is the revised EU Drinking Water Directive (EU) 2020/2184, the key PFAS provisions of which came into force across all 27 member states on 12 January 2026. This is already active law.

The Directive establishes two binding parametric values for PFAS in drinking water:

Standard	Value
Sum of 20 specified PFAS	0.10 µg/L (100 ng/L) — the primary limit
Total PFAS (all detectable)	0.50 µg/L (500 ng/L)
In force since	12 January 2026 across all EU member states
Covers	Drinking water supplied by water utilities to consumers
European treatment investment	€3.6 billion projected across 10 countries, 2026–2036
Dominant initial technology	Granular activated carbon (~80% of first-phase investment)

Total PFAS treatment spending across ten European countries is projected at €3.6 billion between 2026 and 2036, according to Bluefield Research, with Germany, Italy, France, and Spain accounting for approximately two-thirds of expenditure. The market is transitioning from monitoring to active treatment procurement — granular activated carbon will dominate the initial phase, with ion exchange and reverse osmosis growing as monitoring capabilities mature and regulatory expectations evolve.

For utilities drawing from PFAS-contaminated surface water or groundwater sources, the Drinking Water Directive obligations exist alongside separate requirements under the EU Water Framework Directive, which governs the quality of water bodies themselves. Both frameworks are now incorporating PFAS standards with different timelines and obligations — utilities facing contaminated source water must navigate both simultaneously.

Stream 2: France's national source ban — the first in the EU

While the EU-wide Drinking Water Directive addresses what comes out of the tap, France has taken separate action to address what goes into the environment in the first place. In February 2025, the French National Assembly passed Law 2025-188 — the first national PFAS product ban in the EU.

The law came into force on 1 January 2026 and operates in two phases:

Phase 1 — January 2026	Phase 2 — January 2030
✗ Cosmetics (all PFAS) ✗ Clothing & textiles ✗ Footwear & waterproofing agents ✗ Ski waxes → EXEMPT: PPE / protective clothing → EXEMPT: National defence materials	✗ All textile products ✗ Most industrial textiles → EXEMPT: Technical industrial textiles → EXEMPT: Medical textiles → EXEMPT: National sovereignty uses where no alternative exists
Industrial discharge levy: €100 per 100g PFAS discharged into water (from 2026) Five-year plan to eliminate all industrial aqueous PFAS discharges by 2030	

Source: French Law 2025-188 (passed 20 Feb 2025). Implementing decrees setting thresholds still being finalised.

Figure 2: France PFAS Law 2025-188 — what is banned in each phase and key exemptions. Sources: French Law 2025-188, implementing decrees (in preparation), TUV SUD, King & Spalding.

Critically, the law also addresses the cost question that has long frustrated water utilities: it explicitly shifts responsibility for clean-up costs toward polluters rather than water systems. Industrial facilities releasing more than 100 grams of PFAS into water annually face a levy of €100 per 100 grams discharged. A national five-year plan aims to eliminate all industrial aqueous PFAS discharges by 2030.

'This law puts the cost of cleaning and destroying PFAS on the polluter rather than water utilities.' — Aquatech analysis of France Law 2025-188

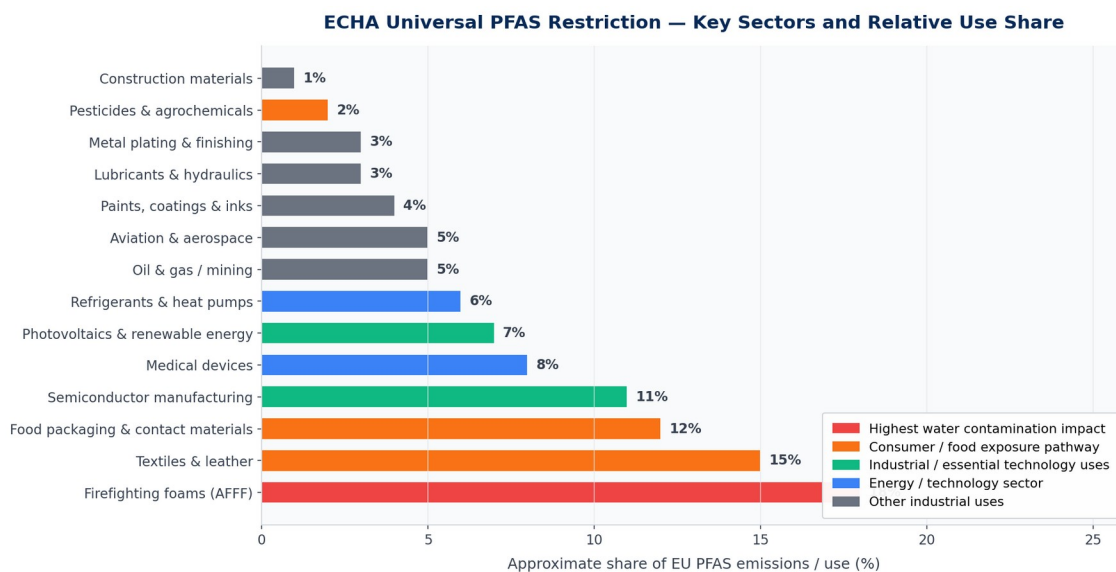
Denmark preceded France with its own PFAS product ban, which includes restrictions on paper and cardboard food packaging and a ban on PFAS-containing consumer clothing, footwear, and waterproof materials from July 2026. Both countries have explicitly positioned their national legislation as building blocks for the broader EU-wide restriction.

Stream 3: The ECHA universal PFAS restriction — the big one

The most consequential regulatory development unfolding in Europe is not the Drinking Water Directive or even France's product ban. It is the proposed universal restriction on all PFAS under the

EU's REACH chemicals regulation — described by legal analysts as potentially the most comprehensive chemical restriction in EU history.

The proposal was submitted to ECHA in January 2023 by the chemical authorities of five countries: Denmark, Germany, the Netherlands, Norway, and Sweden. It covers all 10,000+ PFAS compounds across all uses. In August 2025, after reviewing more than 5,600 stakeholder responses, the five authorities published a substantially revised version of the proposal — expanding the number of proposed derogations from 26 to 74, reflecting the breadth of industrial sectors that depend on PFAS for applications where substitutes are not yet available.



Note: Shares are illustrative estimates based on ECHA Background Document (14th edition, August 2025). Source: ECHA / TheWaterNetwork.com / AquaSPE 2026.

Figure 3: ECHA universal PFAS restriction — key affected sectors and illustrative relative use share. Sources: ECHA Background Document (14th edition, August 2025), EC Chemical Action Plan.

Where the ECHA process stands in April 2026

March 2026 — RAC final opinion adopted: ECHA's Committee for Risk Assessment formally adopted its scientific opinion on the restriction proposal at its March 2026 meeting, confirming that the restriction is appropriate to protect human health and the environment.

March 2026 — SEAC draft opinion agreed: ECHA's Committee for Socio-Economic Analysis agreed its draft opinion at the same meeting. A 60-day public consultation on the SEAC draft opened immediately after.

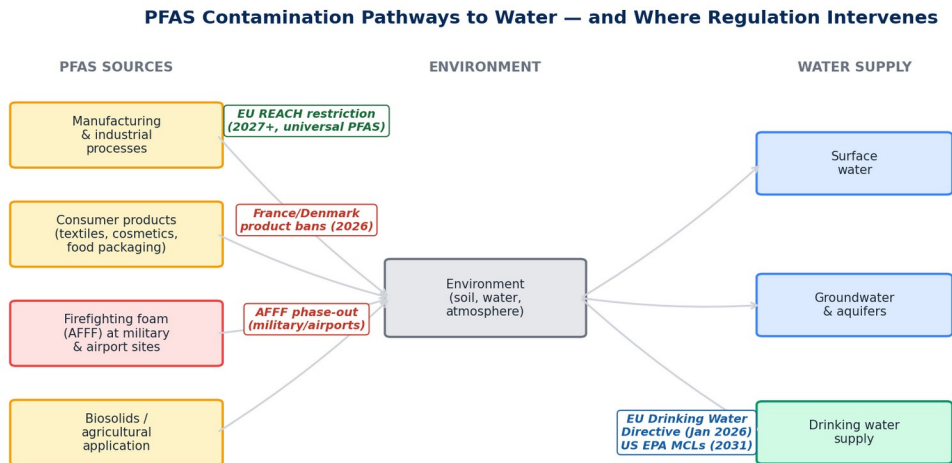
End 2026 — SEAC final opinion expected: Following the consultation, SEAC will adopt its final opinion, completing ECHA's scientific evaluation. The European Commission will then receive both committee opinions.

2027 — European Commission legislation: Within three months of receiving the ECHA opinions, the Commission is expected to draft a REACH restriction regulation for vote by EU member states and the European Parliament. Industry analysts anticipate the restriction entering force in 2027, with transition periods for derogated uses of varying length.

The derogation framework is significant. Sectors where PFAS-free alternatives do not yet exist — including semiconductor manufacturing, certain medical devices, renewable energy components, and

defence applications — are expected to receive time-limited exemptions. Fluoropolymers, which industry argues present different risk profiles to the most toxic PFAS, have been the subject of intense debate and received specific treatment in the updated proposal. The final derogation list will shape the commercial landscape for PFAS-dependent industries for the next decade.

ECHA's firm objective: deliver final RAC and SEAC opinions to the European Commission in 2026. EU legislation anticipated in 2027 — making this the most significant PFAS regulatory development anywhere in the world.



Source regulation (left) reduces future loads. End-of-pipe treatment (right) manages legacy contamination. Source: TheWaterNetwork.com / AquaSPE, 2026.

Figure 4: PFAS contamination pathways to water and the regulatory interventions targeting each stage — from source reduction (left) to drinking water standards (right). Source: TheWaterNetwork.com / AquaSPE, 2026.

Why source bans matter for water professionals

The distinction between source-side regulation and end-of-pipe regulation is not merely academic — it has profound implications for how water utilities plan their long-term capital programmes.

The EU's source-side regulatory stream — product bans, industrial discharge levies, and the coming universal PFAS restriction — is designed to reduce future contamination loads entering the environment. If successful, it will progressively lower the PFAS concentrations that water utilities need to treat. But 'progressively' is the operative word: given PFAS persistence in the environment, treatment obligations built up over decades of industrial use will not disappear quickly even after source reduction measures take effect.

1. Plan treatment systems for current loads, not future reductions. Even optimistic source reduction scenarios will not meaningfully lower aquifer PFAS concentrations for decades. Treatment systems designed and funded today must be sized for current and near-term contamination levels.

2. Track the REACH restriction for supply chain implications. The coming EU restriction will affect the availability, cost, and specification of materials and components used in water treatment systems themselves — including fluoropolymer membranes, coatings, and chemical reagents. Early supply chain assessment is prudent.

3. Engage on the polluter pays framework. France's industrial discharge levy and the broader EU principle that polluters should bear remediation costs represent a significant shift in cost allocation. Water utilities should be actively engaging in the regulatory consultation processes that will determine how these frameworks are implemented — and ensuring the polluter pays principle is strengthened, not diluted.

4. Monitor EU member state implementation divergence. While the Drinking Water Directive sets common standards, implementation pace varies significantly across member states. Water professionals operating in multiple EU jurisdictions should track national transposition separately.

The global significance

Europe's approach — combining strict drinking water standards with the world's most ambitious chemical restriction proposal — is being closely watched in every other major market. The EU's standard-setting role in global chemicals regulation means that when ECHA finalises its universal PFAS restriction opinion and the Commission enacts legislation, it will influence regulatory direction in the US, UK, Australia, Canada, Japan, and South Korea.

Non-EU companies exporting PFAS-containing products to Europe are already required to assess compliance under the proposed restriction — the regulation applies to imported goods as well as EU-manufactured products. The global supply chain implications of the EU's universal restriction will extend well beyond European borders.

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- **Article 2 — Why Your Jurisdiction Matters More Than the National Regulator ✓ Published**
- Article 4 — The Hidden PFAS Pipeline: Industrial Discharge and What's Coming in 2026
- Article 5 — The Disposal Dilemma: What Happens to PFAS After You Remove It?
- Article 6 — PFAS and Environmental Justice: Why the Burden Falls Hardest on Vulnerable Communities

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