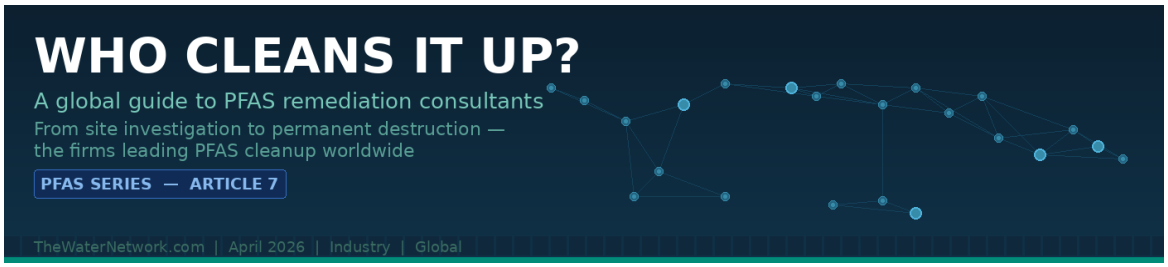

PFAS SERIES — ARTICLE 7

Who Cleans It Up?

A global guide to the consultants and engineering firms leading PFAS site investigation, remediation and destruction

Installing a PFAS treatment system is only the beginning. For every water utility, municipality, or industrial operator facing PFAS contamination, there is a prior — and often harder — question: who do you hire to figure out the problem, design the response, and manage the cleanup?

The PFAS consulting and remediation market has grown rapidly since 2020. What was once a niche practice within environmental engineering firms has become a major service line, with dedicated practices at every major global firm and a growing ecosystem of specialist consultants, boutique firms, and technology-led providers.

This article maps that landscape — from the global engineering giants capable of managing $500 million multi-site DoD programmes, to the specialist firms with deeper scientific expertise, to the boutique and community-focused consultants serving smaller utilities and underrepresented communities. It also confronts the honest reality of where the consulting market has not yet reached: India, China, the Middle East, and most of the developing world.

> ***The right consultant depends entirely on the problem. A complex military site CERCLA programme needs different expertise from a small rural utility trying to comply with a drinking water MCL. Matching the firm to the scope is as important as any technical capability.***

Figure 1: How to Choose — Consultant Type vs. Project Need

Use this matrix to match your PFAS challenge to the right type of firm

SELECTION CRITERIA	GLOBAL ENGINEERING FIRMS AECOM · Arcadis · Tetra Tech · WSP	SPECIALIST CONSULTANTS Ramboll · Geosyntec · Haley & Aldrich	BOUTIQUE & SPECIALIST GrassRoots · EcoChange · Stanley
Complex multi-site / DoD / CERCLA programme	✓✓✓ Best fit	✓✓ Good	✗ Limited capacity
Municipal drinking water MCL compliance	✓✓ Good	✓✓✓ Best fit	✓ Depends on size
Site investigation + risk assessment only	✓✓ Good	✓✓✓ Best fit	✓✓ Good

Litigation & expert witness support	✓✓✓ Best fit	✓✓✓ Best fit	✗ Rare
Emerging markets (India, MENA, LatAm)	✓✓✓ Best fit	✗ Limited	✗ Very limited
Small utility / community system	✗ Often too costly	✓✓ Good	✓✓✓ Best fit
Speed of mobilisation	✗ Slower	✓✓ Good	✓✓✓ Fastest

Source: TheWaterNetwork.com / AquaSPE analysis, April 2026 · ✓✓✓ = best fit · ✓✓ = good option · ✗ = typically not suitable

Figure 1: Selection matrix — matching firm type to PFAS project need. Use as a starting point; always verify specific firm capabilities.

The global engineering firms

The world's largest environmental and infrastructure engineering firms have built substantial PFAS practices since 2018. Their scale enables them to manage the largest, most complex programmes — multi-site military cleanups, national drinking water compliance programmes, and complex CERCLA sites requiring decades of management. Their limitations are cost and sometimes scientific depth on highly specialised questions.

Figure 2: Global Engineering Firms — PFAS Capabilities 2026

The major international firms and what distinguishes their PFAS practice

FIRM · HQ · SPECIALISATION	KEY FACTS & DIFFERENTIATORS
AECOM · USA / Global Full lifecycle PFAS services · DE-FLUORO destruction technology · CERCLA programme management	World's #1 ranked environmental consulting firm. Developed DE-FLUORO PFAS destruction technology in partnership with Aquatech (2024). Active in US DoD remediation and municipal compliance across North America, Europe, Australia and Middle East.
Arcadis · Netherlands / Global PFAS investigation & remediation · foam fractionation · DoD site management	Leading PFAS remediation programmes at US military installations. Demonstrated PFAS destruction with 374Water through DoD's ESTCP programme. Strong EU practice through UK, Netherlands, Germany and Nordic offices. PFAS digital tools and data platform.
Tetra Tech · USA / Global Site characterisation · AI-enhanced analytics · SCWO & electron beam destruction · water treatment design	Ranked among top PFAS programme managers globally. Deploys cutting-edge destruction technologies including electron beam and SCWO. AI-enhanced fate and transport modelling. Active across US, UK, Europe, and Australia. Method 1633 analytical capability.
WSP · Canada / Global Investigation · nature-based solutions · climate-change-adjusted remediation planning	20+ year PFAS practice. Pioneered nature-based PFAS solutions (Alpena, Michigan). Developed climate change impact tool for PFAS site planning. Strong EU and Australian presence. Supports water companies with catchment risk assessments.
Jacobs Engineering · USA / Global PFAS programme management · proprietary data evaluation tools · nature-based solutions	Top-ranked infrastructure firm with dedicated PFAS practice across municipal, industrial and defence sectors. Proprietary data tools for large-scale PFAS portfolio management. Collaboration with CDM Smith on innovative US treatment deployments.
AECOM + Veolia (Evoqua) · USA / Global LEAPfas ion exchange technology · GAC · RO/NF · full-scale municipal treatment systems	Veolia Water Technologies (formerly Evoqua before 2023 acquisition) supplies LEAPfas — a regenerable ion exchange system deployed at scale in US municipal water systems. Partnered on the Borough of Bellmawr, NJ project — one of the first full-scale PFAS compliance deployments.

Sources: Company websites, DoD ESTCP 2025, AECOM/Aquatech partnership announcement 2024, Veolia/Evoqua acquisition 2023

Figure 2: Global engineering firm profiles. Click firm name to visit their website. Capabilities as of April 2026.

The specialist consultants

Beneath the global giants sits a tier of specialist environmental consulting firms whose scientific depth on PFAS often exceeds that of larger competitors. These firms typically have smaller project portfolios but deeper expertise in specific aspects of PFAS — forensic source attribution, litigation support, in-situ treatment technology, applied research. They are often the right choice for scientifically complex questions where technical rigour matters more than programme scale.

Figure 3: Specialist Consultants — PFAS Capabilities 2026

Deep expertise firms for technically complex investigations and remediations

SPECIALIST CONSULTANT · HQ	KEY FACTS & DIFFERENTIATORS
Ramboll · Denmark / Global 20+ year PFAS track record · forensic source analysis · EU + US regulatory expertise	Longest-established PFAS specialist practice globally. Developed PFAS Navigator digital tool for tracking global regulatory developments. Strong in litigation support, source apportionment, and toxicological assessment. Offices across EU, US, Australia, South Asia.
Geosyntec · USA / Canada In-situ soil treatment · DoD demonstration projects · groundwater remediation design	One of 10 firms selected for DoD ESTCP PFAS demonstration programme. Specialises in in-situ soil treatment and complex groundwater plume management. Deep CERCLA expertise and litigation support capability. Strong US, Canadian, and Australian practice.
Haley & Aldrich · USA Applied PFAS research · science-led consulting · airport & industrial sector specialist	Science-first approach with active applied research programme. Specialist in airport, federal, and industrial manufacturing PFAS sources. Deep expertise in PFAS-specific fate & transport, product stewardship, and liability evaluation.
Integral Consulting · USA Forensic PFAS analysis · regulatory & litigation support · risk assessment	Multidisciplinary science firm with deep PFAS forensic investigation capability. Expert in source apportionment, forensic attribution, and litigation support. Provides expert witness services. Strong toxicology and exposure science practice.
Battelle · USA PFAS ANNIHILATOR SCWO technology · full lifecycle remediation · DoD programme management	Non-profit research organisation with 90+ years of applied science. Developed PFAS ANNIHILATOR — a closed-loop SCWO destruction system. GAC RENEW on-site regeneration technology. Selected for DoD ESTCP PFAS demonstration (May 2025). Manages large federal PFAS programmes.
CDM Smith · USA / Global Municipal drinking water treatment · compliance programme design · utility support	Top-ranked municipal water engineering firm. Deep experience designing and permitting PFAS treatment systems for water utilities. Innovative PFAS destruction research in collaboration with Jacobs. Strong in small and medium system support.

Sources: Company websites, DoD ESTCP 2025, Battelle PFAS ANNIHILATOR programme, Ramboll PFAS Navigator tool 2025

Figure 3: Specialist consultant profiles. Click firm name to visit their website.

Treatment technology providers and specialist firms

A distinct tier of firms combines treatment technology with consulting capability — or focuses on specific niches such as community-scale systems, environmental justice communities, or developing markets. These firms often reach clients and communities that the large engineering firms do not serve.

Figure 4: Specialist & Boutique Firms — Including Technology Providers

From large technology vendors to community-focused environmental justice consultants

FIRM · HQ · SPECIALISATION	KEY FACTS & DIFFERENTIATORS
Xylem / Evoqua Water Technologies · USA / Global Municipal & industrial PFAS treatment systems · ion exchange · membrane technology	Following Xylem's 2023 acquisition of Evoqua, the combined entity is one of the largest water technology providers globally. Evoqua's PFAS treatment portfolio — including ISEP+ continuous ion exchange and GAC systems — is now deployed across hundreds of US utilities. Strong service and O&M capability.
Genesis Water Technologies · USA Developing markets PFAS treatment · electrocoagulation · advanced oxidation	Specialist in cost-effective water treatment for communities and utilities in developing markets. Electrocoagulation and advanced oxidation process (AOP) systems adaptable for PFAS reduction. Active in Latin America, Middle East, South Asia and Sub-Saharan Africa — where large engineering firms are often absent.
Green Water Treatment Solutions · USA Community-scale PFAS treatment · GAC & ion exchange systems · rural utilities	Focused on providing accessible PFAS treatment for smaller communities and rural utilities that cannot afford large engineering programmes. Practical, cost-effective system design with strong local support capability.
GrassRoots Environmental Consulting · USA Community engagement · environmental justice · PFAS site assessment	Specialist in environmentally just PFAS consulting — particularly for communities of colour, Indigenous communities, and low-income populations facing contamination. Provides community engagement, site assessment, and advocacy support that larger firms typically do not prioritise.
EcoChange · USA PFAS investigation · remediation planning · environmental compliance	Environmental consulting firm with PFAS site investigation and remediation planning capability. Focused on practical, cost-effective compliance pathways for industrial and municipal clients.
Stanley Consultants · USA Municipal infrastructure · water treatment design · PFAS compliance engineering	Employee-owned engineering firm with strong municipal water infrastructure practice. PFAS compliance engineering for water systems — treatment design, regulatory pathway support, and capital project management.
Perma-Fix · USA Perma-FAS PFAS destruction · RCRA/TSCA permitted facilities · AFFF waste streams	Developed Perma-FAS: low-temperature (≤150°C) PFAS destruction technology — the only commercially available solution operating below supercritical conditions. RCRA, TSCA, and RAD-permitted facilities. Specialist in PFAS-contaminated AFFF, GAC, and sludge waste streams.
Sovereign Consulting · USA PFAS site investigation · CERCLA RI/FS · federal & commercial remediation	10+ years PFAS investigation experience. CERCLA Phase I/II, RI/FS, and remedial design. Serves federal, commercial, and private clients. Practical, cost-conscious approach suited to mid-market industrial and government clients.

Sources: Company websites, Xylem/Evoqua acquisition 2023, EPA Small Systems data, Genesis Water Technologies service areas 2025

Figure 4: Specialist and boutique firm profiles. Click firm name to visit their website.

The honest gap: India, China and the Global South

The PFAS remediation consulting market is overwhelmingly concentrated in North America, Western Europe, and Australia — the jurisdictions with the most mature regulatory frameworks and the greatest ability to pay for professional remediation services. That concentration does not reflect the distribution of PFAS contamination.

India — has documented PFAS contamination in industrial corridors across Tamil Nadu, Gujarat, West Bengal and other states. A 2025 study published in Environmental Science and Pollution Research found critical gaps in India's PFAS regulations, monitoring, and remediation capacity, with no PFAS-specific drinking water or discharge limits in force. The domestic PFAS specialist consulting market does not yet exist. Global firms — Arcadis, WSP, ERM — operate through Indian offices but PFAS is not yet a primary practice area.

China — is both the world's largest historical producer of long-chain PFAS and now a major site of short-chain substitution. PFAS concentrations in Chinese groundwater reach up to 26,700 ng/L in industrial regions, concentrated in Jiangsu, Liaoning, and Jiangxi. China has listed PFOS and PFOA under the Stockholm Convention but has no drinking water MCLs for most PFAS compounds. National remediation capacity is growing but fragmented. Global firms operate through China offices.

MENA and the Global South — arid and semi-arid climates amplify PFAS risk: minimal precipitation and high evapotranspiration concentrate PFAS near the surface, while salinity complicates treatment. AFFF use at airports and military bases across the Middle East, Sub-Saharan Africa, and South Asia has created legacy contamination with almost no remediation response. Genesis Water Technologies is among the few firms with an explicit developing-market strategy.

Figure 5: The Global PFAS Remediation Gap — India, China & the Global South

Where PFAS contamination exists but the consulting market has not yet reached

INDIA	CHINA	MENA & GLOBAL SOUTH
Contamination documented · remediation market nascent	Major contamination · short-chain transition underway	High risk · lowest capacity
STATUS: CRITICAL GAP • PFAS found across industrial corridors in Jiangsu-equivalent industrial zones in Tamil Nadu, Gujarat, West Bengal • No PFAS-specific drinking water or discharge limits as of April 2026 • Predictive models show surface water concentrations will exceed safe limits in key states within 30 years • Global firms operate through Indian offices — Arcadis, WSP, Ramboll active • Domestic PFAS specialist market does not yet exist	STATUS: GROWING CONCERN • PFAS in groundwater: N.D. to 26,700 ng/L — concentrated in Jiangsu, Liaoning, Jiangxi • China is transitioning from long-chain PFAS to short-chain substitutes — creating new contamination profiles • PFBS, PFBA now dominant in many industrial groundwater samples • National remediation capacity growing but fragmented • Global firms operate through China offices — Arcadis, AECOM, ERM active	STATUS: URGENT & UNDERSERVED • Arid climates amplify PFAS persistence — minimal precipitation, high evapotranspiration concentrate PFAS near surface • AFFF use at airports and military bases widespread with limited post-use remediation • Jordan, Lebanon: PFAS documented in groundwater from AFFF • Sub-Saharan Africa, Latin America: very limited monitoring data • Developing-market specialists (Genesis Water Technologies) critical in these regions
REGULATIONS: No PFAS limits. Stockholm Convention POPs obligations apply.	REGULATIONS: PFOS/PFOA listed under Stockholm. No drinking water MCLs for most PFAS.	REGULATIONS: No PFAS-specific standards in most MENA countries. Stockholm POPs apply.
WHO OPERATES: Arcadis India · WSP India · ERM India · SGS · Bureau Veritas	WHO OPERATES: AECOM China · Arcadis China · ERM · China National Environmental Protection Group	WHO OPERATES: Genesis Water Technologies · Veolia · SUEZ · local environmental ministries

Sources: Springer Nature 2025, ScienceDirect 2025, e3s-conferences.org 2023, RSC Environmental Science Water Research 2026 · TheWaterNetwork.com / AquaSPE 2026

Figure 5: Emerging market PFAS status. The global consulting market has not kept pace with the global spread of PFAS contamination.

What to ask when selecting a PFAS consultant

1. What is your experience with this specific contamination type? PFAS in landfill leachate requires different expertise from PFAS in AFFF-impacted groundwater or in small drinking water systems. Ask for directly comparable project references.

2. Who specifically will work on my project? PFAS expertise is not uniform across even the largest firms. The partner or director who wins the work may not be the scientist who does it. Ask to meet the technical lead before signing.

3. What is your position on destruction vs. containment? Some firms default to pump-and-treat containment because it is familiar. The best PFAS consultants will challenge that default and evaluate destruction options rigorously.

4. Do you have litigation support capability? In a CERCLA or cost-recovery context, your consultant may eventually be an expert witness. Scientific rigour and documentation discipline matter from day one.

5. What is your approach to community engagement? PFAS remediation has significant public health and environmental justice dimensions. A consultant who treats community communication as an afterthought is a liability, not an asset.

6. How do you handle regulatory uncertainty? PFAS regulations are changing rapidly. Your consultant should be actively tracking the regulatory landscape — not just reacting to it.

> ***The best PFAS consultant is not always the largest, most recognised firm. It is the firm whose specific team has directly relevant experience with your contaminant profile, your regulatory jurisdiction, and your community context.***

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