Methodology

The list of the top PFAS producers is based on the SIN Producers List and the number of PFAS substances chemical companies produce or import in the European Union or the United States. Due to the fact that this is an extremely opaque industry, there is unfortunately no available information on what is being produced in other regions of the world, such as Asia.

The SIN Producers List is an established ChemSec tool that uses official chemical registration and manufacturing data to identify companies that produce hazardous chemicals. It is frequently updated. The tool identifies companies that officially register themselves as producers of specific PFAS chemicals.

Their lack of transparency, however, means we are unable to establish the volumes they manufacture. Because they have registered themselves as PFAS producers, however, we assume that they produce these PFAS.

However, through our own data sources that we have built up over many years, as well as digging into public company documents, ChemSec is confident in saying that the companies on this list are the top PFAS producers in the world.

Companies are sorted in alphabetical order.

Market sizes

Estimation of size of global chemicals market

Year	Global chemical market	Source basis	Links/references and comments
2019	~USD 4.6–4.7 trillion	Implied from pre-COVID trajectory; Statista/ACC historical series	Statista / American Chemistry Council, *Total Revenue of the Chemical Industry Worldwide, 2005–2022*; Statista, *Chemical Industry Worldwide — Statistics & Facts*. The 2019 figure is implied from the pre-COVID trajectory in the historical series; it is not directly quoted in the public portions of these sources and should be treated as an interpolation.
2020	~USD 3.9–4.0 trillion	COVID-19 impact: Statista notes ~35% revenue decline in 2020	Statista / American Chemistry Council, *Total Revenue of the Chemical Industry Worldwide, 2005–2022*; Statista, *Chemical Industry Worldwide — Statistics & Facts*. The ~35% decline in 2020 revenue is explicitly stated in Statista's industry overview.
2021	~USD 4.7 trillion	Statista/ACC: "highest revenue in 15 years" at USD 4.73 trillion	Statista / American Chemistry Council, *Total Revenue of the Chemical Industry Worldwide, 2005–2022*; Statista, *Chemical Industry Worldwide — Statistics & Facts*. The USD 4.73 trillion figure is described as the highest revenue in 15 years at that time.
2022	~USD 5.7 trillion	Statista/ACC: USD 5.72 trillion; CEFIC Chemdata: ~EUR 5.4 trillion	Statista / American Chemistry Council, *Total Revenue of the Chemical Industry Worldwide, 2005–2022*; Statista, *Chemical Industry Worldwide — Statistics & Facts*, reporting USD 5.72 trillion; corroborated by CEFIC Chemdata International world chemical sales data (CEFIC *Facts & Figures 2025*; 5-HT.com, *Challenges of the Chemical Industry: Status Quo 2024*), which reports approximately EUR 5.4 trillion for the same year on a slightly narrower NACE 20 production basis.
2023	~USD 6.2 trillion	MarketsandMarkets (includes broader scope); CEFIC Chemdata estimates broadly consistent	MarketsandMarkets, *Global Chemical Industry Outlook 2024–2025*; MarketsandMarkets, *Global Chemical Industry Outlook 2024 Blog Summary*, estimating USD 6.2 trillion; note this figure likely reflects a broader scope (possibly including pharmaceutical chemicals) and should be interpreted accordingly. CEFIC Chemdata data broadly corroborate the order of magnitude.
2024	USD 5.8–6.2 trillion	Range across SNS Insider (5.82tn), MarketsandMarkets (6.18tn); central estimate: ~USD 6.0 trillion	SNS Insider, *Global Chemical Market Size & Share Report 2032*, USD 5.82 trillion; MarketsandMarkets, *Global Chemical Industry Outlook 2024–2025*, USD 6.18 trillion; Market Research Future, *Chemical Industry Market Size, Revenue and Forecast 2035*, USD 5.14 trillion. The central estimate of ~USD 6.0 trillion is the author's midpoint across these sources, weighted towards the two most commonly cited figures.

Why the range is wide

The 2023–2024 period saw a correction from the 2022 price spike (driven by post-COVID energy and raw material inflation). Revenue in nominal USD terms therefore fell from the 2022/2023 peak in several estimates, while underlying volumes remained relatively stable. The USD 5.8tn vs. USD 6.2tn spread reflects this price vs. volume dynamic as well as definitional scope differences.

<u>Assumption:</u> This estimate excludes pharmaceutical chemicals from the total.
<u>Central estimate adopted:</u> USD 6.0 trillion for 2024 (excluding pharmaceuticals).

Estimation of size of global PFAS chemicals market

Source	Type	Year of Data	Market Size Estimate	Scope	Reference
BIS Research / ResearchAndMarkets	Market research report	2023	$29.5 billion	PFAS chemicals (broad)	BIS Research / ResearchAndMarkets
TechSci Research / GlobeNewswire	Market research report	2023	$14.25 billion	PFAS chemicals	TechSci / GlobeNewswire
Emergen Research	Market research report	2024	$15.24 billion	PFAS chemicals	Emergen Research / openPR
HTF Market Intelligence / Mordor Intelligence	Market research report	2024	$32.9 billion	Fluorochemicals (broad)*	HTF / Mordor Intelligence
Grand View Research	Market research report	2024	$10.64 billion	Fluoropolymers only	Grand View Research
Allied Market Research	Market research report	2023	$10.4 billion	Fluoropolymers only	Allied Market Research
MarketsandMarkets	Market research report	2025	$10.32 billion	Fluoropolymers only	MarketsandMarkets / PR Newswire
Statista / Extrapolate	Aggregator	2023	~$28–29 billion (by application)	PFAS by end-use sector	Statista (paywall)

<u>Assumptions:</u> Fluoropolymer market represents a third of the total PFAS chemical market. And * represents the total fluorochemical market (of which PFAS is the largest subgroup, a factor of 0.9 has been applied to this figure.
<u>Central estimate adopted:</u> USD 26.4 billion for 2024.