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The Rubber Letter

Final quarter before the EUDR, PFAS restriction reaching its final stage: how to get ahead on your FKM seals.



FROM THE EDITOR

Autumn 2026 opens the last quarter before the EUDR starts to apply, while the European restriction on PFAS enters its final assessment stage.

Two dossiers that hit sealing directly: traceability of natural rubber on one side, the future of fluoroelastomers on the other. This issue takes stock and sets out a method to prepare.

KEY FIGURES

≈ 400,000 t

Expected global shortfall in natural rubber in 2026 — sixth consecutive year (ANRPC)

30.12.2026

EUDR applies to large and medium-sized companies (SMEs: 30 June 2027)

93 %

Share of European fluoropolymer uses covered by six materials, including FKM/FFKM (ITRE study)

Industry news

REGULATION

EUDR: the final quarter before the deadline

From 30 December 2026, large and medium-sized companies must prove the “zero deforestation” origin of natural rubber placed on the European market (30 June 2027 for micro and small companies). In July, the Commission updated the product scope; newly added products will only be covered from 30 December 2027.

PFAS

Fluoroelastomers: the restriction takes shape

After the final opinion of the RAC committee (March) and the SEAC consultation closed on 25 May, ECHA aims to complete its scientific assessment by the end of 2026. Fluoropolymers — FKM, FFKM, PTFE — are not excluded, but would fall under a derogation framework with traceability and documentation requirements.

PRICES

SYNTHETICS

Natural rubber: firmness persists

In China, natural rubber moved from around $2,456/t in April to $2,601/t in June (+5.9%), as drought delayed tapping in the main producing regions. Rising stocks did, however, slow the movement at the end of the quarter.

Petrochemicals: volatility settles in

Tension on naphtha, linked to shipping disruption in the Strait of Hormuz, sent polybutadiene up 36.2% in a month in Shanghai in the spring. The cost of synthetic elastomers remains closely indexed to energy.

Trends & outlook

01

Supplier documentation

Due diligence statements, composition sheets, REACH compliance: documentation is becoming a purchasing criterion in its own right.

02

Fluorine-free alternatives

HNBR, AEM and EPDM are being reassessed wherever fluid chemistry and temperature allow.

03

Safety stocks

As the EUDR deadline approaches, buyers are building up stocks of critical natural rubber references.

04

Hydrogen & energy

Applications where fluoropolymers remain hard to replace — a central argument in derogation requests.

TECHNICAL TIP OF THE MONTH

Get ahead of the PFAS restriction on your FKM seals

Even with derogations, fluoroelastomers will be subject to more documentation. Better to prepare your reference portfolio now.

01

Map

List every FKM, FFKM and PTFE reference, with application, fluid and service temperature.

02

Document

Ask your suppliers for up-to-date composition and REACH compliance statements.

03

Qualify

Identify the applications where a non-fluorinated alternative (HNBR, AEM, EPDM) is technically viable, and validate it through testing.

04

Secure

For critical uses with no alternative, plan stock and full traceability ahead of the derogations.

DID YOU KNOW?

As heating season returns, think about storage: ISO 2230 recommends keeping elastomers away from light, ozone and heat sources, below 25 °C, in their original packaging and free of mechanical stress. A badly stored seal ages before it is even fitted.

SOURCES — ANRPC, EUROPEAN COMMISSION (DG ENVIRONMENT, ACCESS2MARKETS), ECHA, PROCUREMENT RESOURCE, MORDOR INTELLIGENCE, ITRE STUDY.

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