F-Gas Insulation Foams Study Questionnaire Launch Event

Presentation to

F-gas & Insulation Stakeholders

18 February 2026

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On behalf of RPA project team

Workshop admin

- **Please note this meeting is being recorded**
  - A recording is being made for stakeholders who are unable to attend or who join the process later
  - A copy of the recording (along with the slide deck) will be provided to all participants via a directly accessible only link on the RPA website
- **Competition law rules and restrictions are also in effect**
- **Please use the chat function to ask any questions or raise points of interest throughout the session**
  - That chat will be monitored by my colleagues who will answer your questions on a rolling basis, and I will periodically pause to allow for repeated or pressing questions to be addressed live
  - Individuals asking questions will not be included in the event recording

Agenda

- **Introduction to RPA**
- **Introduction to the insulation foams study**
  - Purpose
  - Aims
  - Scope
  - Approach
- **Introduction to the questionnaire**
  - Data requested
  - Data handling and security
  - Collation, aggregation and anonymisation
- **Guided questionnaire walkthrough**
- **Next steps**
- **Questions**

Introduction to RPA

- An independent consultancy firm established in 1990 specialising in the fields of chemical policy (UK & EU), sustainability, economics, environmental economics and assessment, and social policy research
- Extensive experience with F-gases via previous public and private client work connected to the UPFAS restriction proposal
- Previously conducted multiple F-gas insulation reviews and assessments for private companies and industry associations

Purpose

- To produce an independent, rigorous, data-driven impact assessment, in line with the Better Regulation Guidelines, for use by PU Europe and industry to inform arguments to retain market access for F-gas blowing agents in insulation foams
- Therefore, in addition to conducting a thorough overview assessment a wider purpose of this project is to begin to draw together available literary and industry data on the technical performance of F-gas and alternative blowing agents, and data on both insulation foams and other insulation solutions
- RPA are acting as an independent third party on behalf of blowing agent and insulation stakeholders to pull together the necessary data on both F-gases, insulation foams, and alternatives in Europe

Aims

- **There are 4 key aims of this study:**
  - To conduct a comprehensive literature review of thermal insulation solutions, and blowing agents, to identify key performance criteria, and values of solutions and blowing agents
  - To analyse alternatives looking at performance and technical differences between blowing agents and insulation solutions, while additionally considering environmental and health considerations from alternatives
  - To quantify the value of the foam insulation market with Europe and possible economic damages that may be realised across Europe from a ban on F-gas blowing agents under the F-Gas Regulation
  - To summarise and define any key data points which remain unavailable after consultation and literature review, and distil all findings into a concise easily digestible report
- **We are engaging with stakeholders to collect data which are required to achieve points 2 and 3 above which are fundamental to the overall project success**

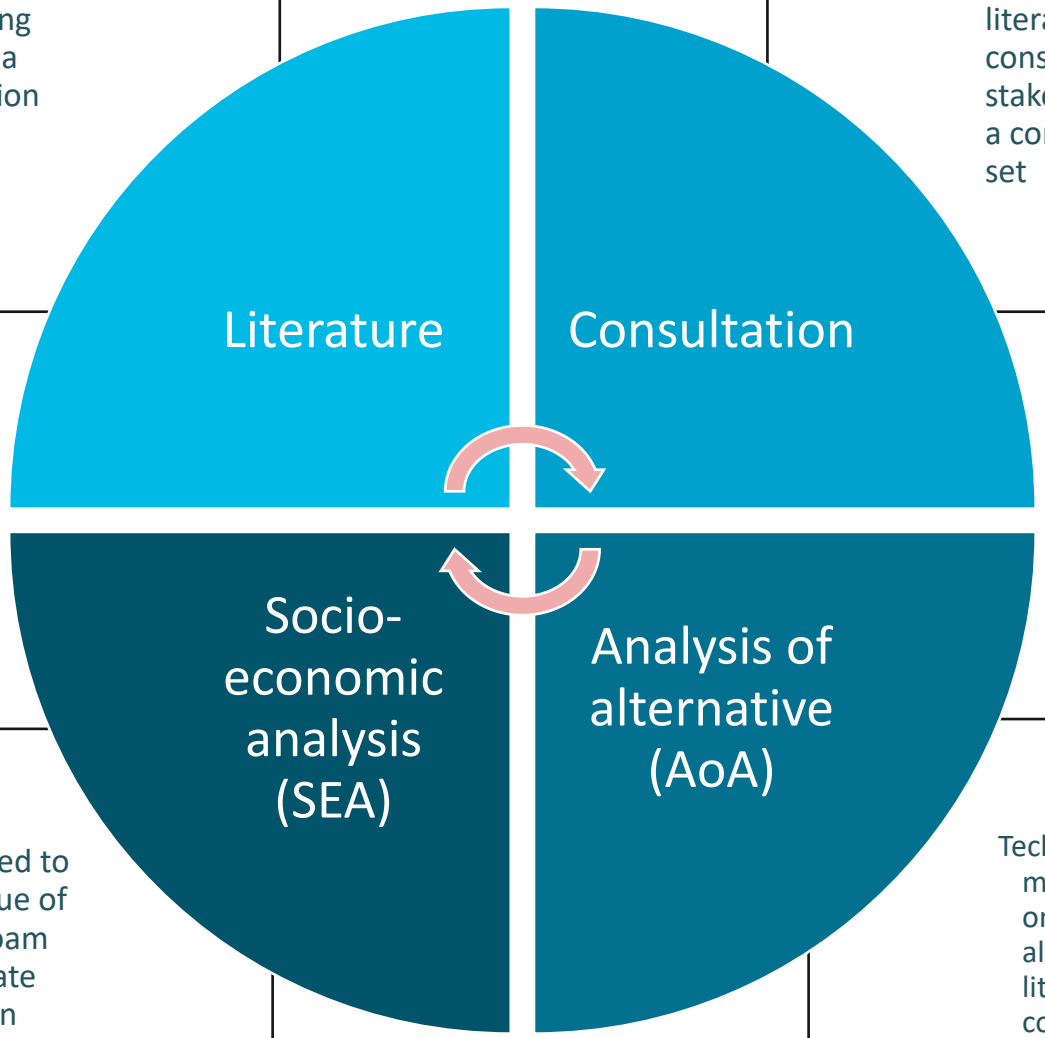
Scope

- **Stakeholders: 4 groups of interest from the cold chain**
  - Blowing agent (F-gas and non-F-gas) manufacturers and suppliers
  - Insulation (foam and non-foam) manufacturers
  - Use specific downstream users and stakeholders
  - Trade/industry associations
- **Blowing agents:**
  - Low GWP F-gases (we are interested in F-gas blowing agents collectively, not individual F-gas products)
  - Non-F-gas blowing agents (water, carbon dioxide, methyl formate, methylal, and pentane and butane isomers)
- **Insulation products:**
  - F-gas blown foams (all types of foams)
  - Non-F-gas blown foams (all types of foams)
  - Non-foam insulation (mineral wool, cellulose, organic wool, polystyrene, and phenolic insulation)
- **Insulation applications:**
  - Construction (buildings) in walls, floors, and pitched/flat roofs
  - Refrigeration and cold storage supply chain including transport refrigeration (trailers, trucks, and light commercial vehicles)
  - Pipe insulation (district heating and cooling, oil and gas, and chemical plants)

Approach

Literature used for scoping, developing initial results and a two-way verification method for consultation data

Gaps exist within literature requiring consultation with stakeholders to provide a comprehensive data set



Economic data is used to determine the value of the F-gas blown foam market and estimate impacts from a ban

Technical, economic, market, and health data on F-gases and alternatives from literature and consultation are used to determine viability

Stakeholder Survey

What is being asked for and how will your data be used

Key data we are requesting

- **AoA data**
  - Technical performance of alternative solutions
  - Legal/ industry/ customer requirements
  - Emission & toxicity concerns of alternatives
  - Availability of alternatives
  - Transition timeline
- **SEA data**
  - Volumes of foams/mixtures manufactured and supplied
  - Revenues and profits of sales related to F-gas foams
  - Market growth estimates for both volume and value
  - Value of R&D spending and CAPEX investment for foam related activities
  - Your company/industry's reaction to a ban on F-gases in foams
  - Employment data and possible unemployment projections
- **AoA data is requested for both blowing agents and insulation solutions, with insulation solution AoA data also be requested for each insulation application**

Data handling and security

- Survey is hosted on EU Survey, an online platform operated by the European Commission with all data stored on European servers, meaning all data supplied via the platform is protected under GDPR
- Only RPA has access to your responses in EU Survey, and these will never be shared with PU Europe, their members or any third party (typical RPA practice)
- RPA will collate, aggregate, and anonymise survey responses and then further collate and aggregate survey data with literature findings preventing individual respondent identification
- RPA has 30+ years experience handling, protecting, and anonymising confidential data for industry reports

Collation, aggregation and anonymisation

- **All data collected via the questionnaire will effectively go through two phases of collation and aggregation**
  - Survey data once extracted will be collated with respective values from the literature review and then all values will be aggregated together (in averages or ranges) before being presented in the final report
  - Therefore, any data supplied in the questionnaire will be aggregated with all other survey responses and then further aggregated with literature data
- **This collation and aggregation process will ensure that any values presented in the final report are not traceable or associated with any one single questionnaire respondent thus granting anonymisation**
- **For qualitative information RPA will again aggregate together repeated themes and consensus between questionnaire responses and literature before presenting qualitative points and if direct quotes are required, permission of the submitter will be sought but they will not be named**
- **Respondents will also be asked if they are happy for the data they supply in this survey to be used by RPA in another very similar study being conducted by RPA for the European Fluorocarbons Technical Committee (EFCTC)**

Survey demonstration

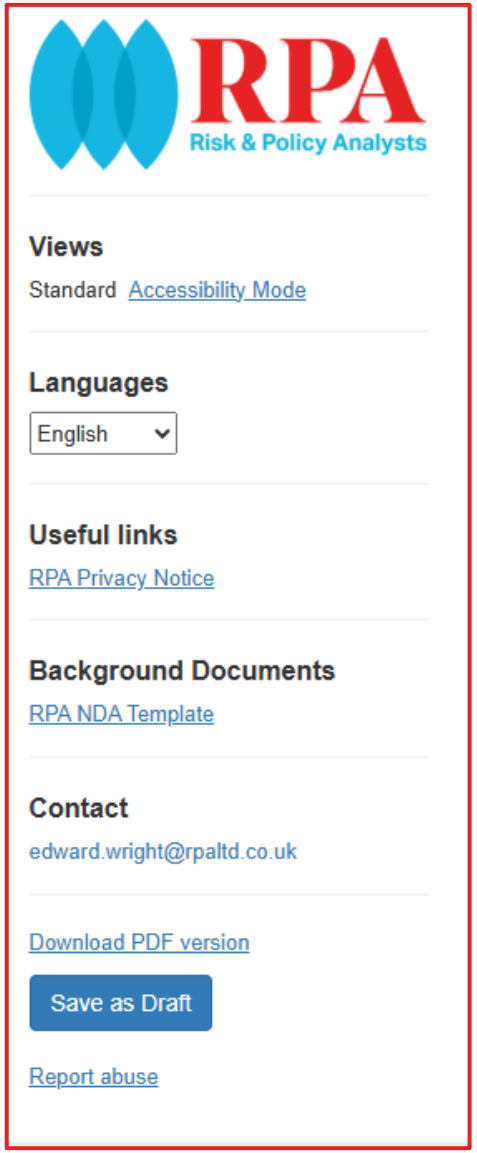
https://ec.europa.eu/eusurvey/runner/PUEurope_European_Insulation_Study

Sharing your survey internally

- The survey does not need to be completed in one go, it can be completed iteratively with the “Save as Draft” function
- After clicking this option, a unique link will be generated which can be shared with others to access the survey and add more data
- Each time you enter new information into the survey you need to click the “Save as Draft” button again (the access link will not change)
- Once your survey answer is complete you must select “Submit” at the end of the survey not “Save as Draft” as the study team cannot access drafts
- Please note it is not advised to have multiple people accessing the link and inputting data simultaneously as this can cause syncing and lost data issues

Survey admin notes

- The survey is available until 11:59pm on the 13/03/2026
- The survey has been machine translated into DE, FR, ES, IT, NL, and PL
- Should you need to review the RPA privacy policy this is available to access in the survey
- If you have questions or any issues you can contact Edward Wright at RPA directly (Edward.wright@rpaltd.co.uk) or use the contact function in the survey
- Should you wish to view the full survey (some questions are hidden by conditions) you can download a PDF version of the survey
- NDAs can be arranged and signed upon request if required, to facilitate this a template of RPAs standard NDA has been attached to the survey



Next steps

- Review the questionnaire early and complete what information you can initially
- Create and save a draft response and distribute this within your organisation to relevant parties
- Distribute the questionnaire link and this presentation to customers and clients to increase data catchment
- Reach out to RPA as soon as possible with any comments or questions

Questions and answers

- **How shall the gathered final information be used process-wise? Application for derogation or something else?**
  - The ultimate objective of PU Europe is to retain market access for PU foams in Europe, for the benefit of manufacturers, professional users, and the downstream consumers who benefit from the properties imparted by PU foams in multiple products. The intention is to retain PU foam as a key thermal insultation option to help the EU meet its ambitious climate targets. The outcome of the study is expected to support the above by providing an independent and rigorous impact assessment, not expected to be carried out by the European Commission, on the proposed prohibition to the placing on the market of F-gases in insulation foams by 1 January 2033. The intention will be to demonstrate any unintended consequences of the proposed ban and demonstrate the level of coherence with other EU legislation, including the potential impact on the EU's ambitious climate objectives. The data from the proposed study is expected to inform PU Europe's advocacy activities and to develop and extend the arguments submitted by PU Europe to ECHA in 2023.
- **The scope seems very broad. How to draw specific conclusions e.g. for PU foam ultimately?**
  - The ability to draw conclusions from the data on individual sectors depends on the engagement and responses we get from the survey, which will be supported by publicly available data - individual sectors' input is, therefore, important.

Questions and answers (cont.)

- **What are you doing to ensure all relevant companies and trade associations are reached and respond - to make sure you get enough data to develop a realistic view on all the points? Perhaps the answer period could be longer?**
  - RPA has existing relationships within the insulation sector. This combined with bilateral communications from PU Europe, ensure a strong contact base to begin with. We also encourage you to reach out to relevant interest stakeholders. As for ensuring responses are submitted, our invitation emails, which can be freely forwarded, will stress the importance of data submission in order to increase the likelihood of retaining market access. We appreciate your concern regarding the answer period. RPA welcome the opportunity for 1-on-1 interviews to facilitate a more time-efficient data handover process.
- **For construction insulation products, are we going to quote roofing applications?**
  - The full scope of the Construction sector is: Insulation in walls, floors, and pitched/flat roofs. While RPA believes the supply chains and actors are significantly different among these sectors, it is understood that under each category of application there is a high level of similarity in terms of the technology and functionality and performance requirements of the PU foam. Therefore, this assessment will focus on conducting its AoA activities at the category level, meaning the AoA will assess alternatives to PU foam used in the overall construction sector, not alternatives specific to e.g. floor, roof, and wall insultation.

Questions and answers (cont.)

- **Why are other insulation materials being assessed, when it is F-gas that has the threat of restricted market access?**
  - The study focuses on the substitutability of blowing agents, but to properly assess this, it must also examine alternatives to the insulation products made using those agents. If only F-gas-blown foam provides a viable insulation solution, this suggests F-gas blowing agents remain necessary. Conversely, if insulation performance can be achieved using non-foam or non-F-gas alternatives, the need for those blowing agents weakens. Regulators assess both the blowing agent and the final insulation product, so the study evaluates them together to robustly justify the continued need and use of F-gas blowing agents.
- **Who is this survey being distributed to? Is there data on respondent representation?**
  - The survey is being distributed beyond today's attendees. While PU Europe members are key respondents due to their data, the survey is also being shared across wider supply chains and downstream users through association outreach and link cascading between customers. RPA and PU Europe are actively expanding participation. Representation statistics are still being developed, as engagement and responses are ongoing. Where direct survey data is limited, we will supplement using available AOA data, published literature, and public statistics, alongside established gap-filling methods to generate indicative insights. However, we are still actively working to increase participation from downstream stakeholders to strengthen dataset robustness.

Thank You

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