

State of the Super Pollutant Ecosystem

2026 Ecosystem Survey — Findings & What We
Did With Them

Earlier this year, many super pollutant-focused organizations completed our ecosystem health survey. This document shares what we found, what it means, and what we are doing about it.

The responses were presented alongside super pollutant funding data at a day-long convening of 16 philanthropic funders in London in June 2026. The findings helped shape a substantive funder conversation on super pollutant strategy.

We are sharing this report to be transparent about the results and how we are responding. If you have input on the findings, we want to hear from you.

Before you read

47 organisations completed the 2026 survey, compared to 35 in 2024. When comparing the two years, read the numbers as directional rather than as a precise trend line. The two surveys reached a partially different pool of respondents: 79% of 2026 respondents did not participate in 2024, and 2026 included government and industry respondents for the first time. As a result, some of what changed reflects the ecosystem growing.

We made an effort to re-aggregate 2026 data excluding government and industry respondents to make these findings more directly comparable to 2024. We use both sets of 2026 data in this report. Where population differences impact the finding, we say so.

ABOUT THE RESPONDENTS

47 organisations across the super pollutant ecosystem.

57% NGO/CSO. 15% government (new in 2026). 11% industry (new in 2026). 9% academia. 6% re-grantors/intermediaries.

NGO/CSO		57%
Government		15%
Industry		11%
Academia		9%
Re-grantors		6%

Work spans all major super pollutants.

91% focus on methane, 47% black carbon, 43% super pollutants / SLCPs as a group, 40% HFCs, 26% N₂O, 21% tropospheric ozone.

Methane		91%
Black carbon		47%
SLCPs		43%
HFCs		40%
N ₂ O		26%
Trop. ozone		21%

Geography

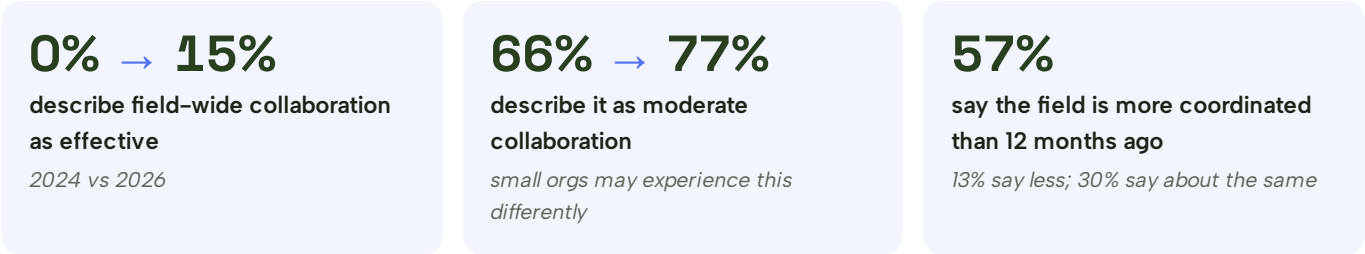
Half of respondents work globally. Respondents also provided the specific geographies they work with. South America (36%), North America (28%), Europe (28%), Sub-Saharan Africa (26%), Latin America and the Caribbean (23%) and Asia (18%) among the most represented regions where work takes place.

S. America		36%
N. America		28%
Europe		28%
SS Africa		26%
LAC		23%
Asia		18%

FINDING 1

1 Collaboration is improving and the needs have shifted

The clearest positive shift between 2024 and 2026 is in how the field experiences collaboration. In 2024, no respondent described field-wide collaboration as effective, and 21% said they simply didn't know how to characterise it. By 2026, those numbers had moved significantly.

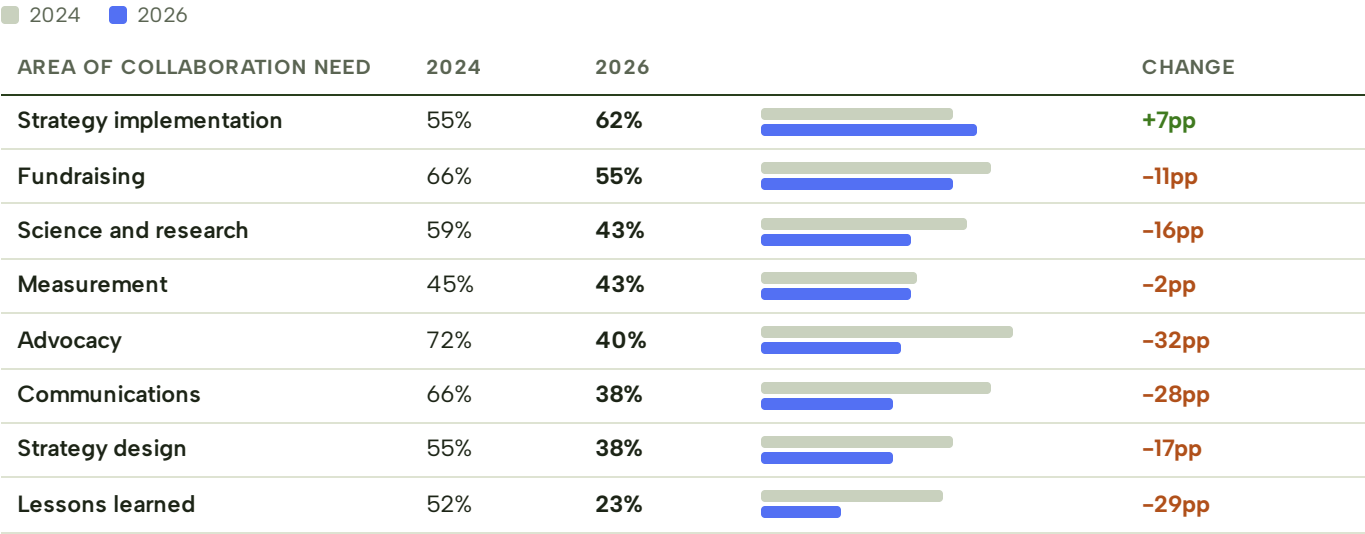


The drop in 'I don't know' responses — from 21% to 2% — may be the most telling number. In 2024, a fifth of the field either didn't have enough visibility to assess, or didn't feel confident forming a view. By 2026, almost everyone has a view.

What is driving the improvement? Open-text responses point to three things: increased funding availability, the influence of the Global Methane Pledge on raising expectations, and coordinating bodies.

What the field most needs to collaborate on has changed

In 2024, advocacy (72%) and communications (66%) were the top areas where respondents said collaboration was most needed. By 2026, strategy implementation has moved to the top — with advocacy down 32 percentage points and communications down 28 percentage points.

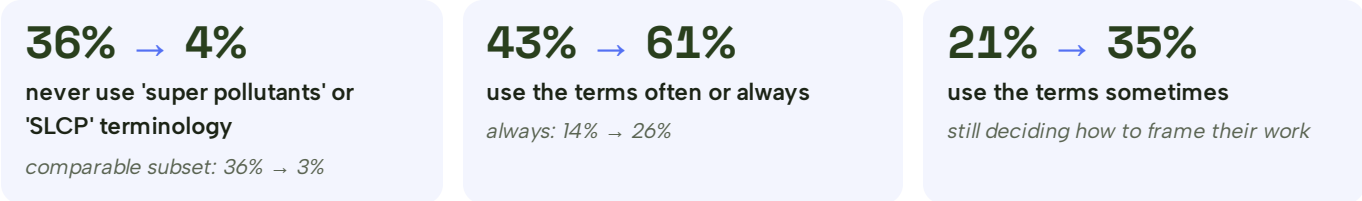


This is not a small shift. The responses indicate that the ecosystem has moved past asking *how to make the case for super pollutants* towards *how to execute together*.

2 Shared language is spreading; shared strategy is uneven

The language shift is notable

In 2024, 36% of respondents said they never used the terms 'super pollutants' or 'short-lived climate pollutants' in their communications. By 2026, that figure is 4%. The shift is significant even accounting for the different respondent pool — when we look only at NGO/CSO respondents (the population most comparable to 2024), the 'never' figure drops to 3%.



Shared language matters because it is a precondition for shared strategy. The field cannot coordinate effectively on 'super pollutants' if half of it is communicating about methane, HFCs, and black carbon as separate issues. These findings indicate that shared language is growing within the ecosystem, which is a useful precursor to shared identity and agenda setting.

But shared strategy is mixed within pollutants

Below the surface of improved overall cohesion, the picture on shared strategy by individual pollutant is more complicated — and more honest about where the ecosystem actually is.

POLLUTANT	% SOMEWHAT/CLEAR STRATEGY 2024	% SOMEWHAT/CLEAR STRATEGY 2026	WHAT CHANGED
Super pollutants / SLCPs as a group	14%	38%	↑ Biggest improvement — field is cohering at the group level
Methane (CH ₄)	72%	62%	↓ Slight decline; 'clear strategy' dropped 10pp
HFCs / F-gases	58%	48%	↓ Slight decline
Black carbon	13%	24%	↑ Improving from a low base — no 'clear' strategy yet
Nitrous oxide (N ₂ O)	24%	10%	↓ Sharp decline; 'don't know' jumped from 6% to 37%
Tropospheric ozone	0%	15%	↑ Modest improvement from near-zero

The N₂O finding is the most significant signal in the entire dataset. In 2024, 24% of respondents reported some or clear shared strategy on N₂O. In 2026, that moved to 10% with 37% of respondents saying they don't know whether a shared strategy exists. This may reflect a genuine fragmentation of the N₂O field following changes in funding, or it may reflect that many 2026 respondents are newer to this work and don't yet have visibility.

The methane slight decline is likely a maturation effect. As the methane field grows more complex, with more funders, more geographies, more sub-sector strategies, the sense of a single shared strategy naturally fragments. This is not necessarily bad. But it means the coordination challenge is evolving.

3 The field is growing — but remains financially fragile

Two facts sit uncomfortably next to each other in the 2026 data, and both are true at the same time.

GROWTH

Growth: 66% say their work grew

The majority of respondents report that their work and capacity expanded in the past 12 months. Only 6% report contraction. The primary driver, from open-text responses, is funding availability and increasing policy attention — especially around the Global Methane Pledge and Kigali momentum.

FRAGILITY

Fragility: 35% are financially precarious

On a 1–5 scale of financial sustainability, 20% of respondents rate themselves at 1 (the weakest) and 15% at 2. Only 11% rate themselves at 5. A field where more than a third of its organisations are financially precarious is growing on uncertain foundations.

FORMATION

A field in formation: half are newly funded

First funding years cluster heavily in 2021–2024. More than half the field received its first dedicated super pollutant funding in the last five years. Six respondents have not yet received any dedicated funding. The ecosystem is still in early formation.

UNLOCK

What would unlock more: funding, and flexibility

68% of respondents say multi-year unrestricted funding is what they most need. Project-specific funding is cited by only 21%. Open-text responses on what funders could do differently are strikingly consistent: longer timelines, flexible use, less administrative burden, and trust-based partnerships.

66%

say their work grew

6% report contraction

35%

rate financial sustainability 1 or 2 of 5

20% at 1 · 15% at 2 · 11% at 5

68%

most need multi-year unrestricted funding

project-specific: 21%

“Multi-year unrestricted funding would change everything. Right now we spend as much energy on grant applications as on programme delivery.”

Survey respondent, 2026

“The most important thing funders could do is commit for five years, not three. Three years is not enough to build the policy relationships that make change stick.”

Survey respondent, 2026

4 Respondents point to needs outside of their organizations' current focus areas

The survey asked two related questions: which super pollutants does your organisation focus on? And where should additional philanthropic resources be directed? The gap between the two reveals something important about the field's own view of where investment is most needed.

■ % currently focusing on it ■ % saying more funding needed

POLLUTANT	% CURRENTLY FOCUSING ON IT	% SAYING MORE FUNDING NEEDED		GAP	WHAT THIS MEANS
Methane (CH ₄)	91%	83%		-8pp	Slight saturation signal
Black carbon	47%	38%		-9pp	Broadly aligned
HFCs / F-gases	40%	32%		-8pp	Broadly aligned
Nitrous oxide (N ₂ O)	26%	40%		+14pp	Field sees under-investment
Tropospheric ozone (O ₃)	21%	26%		+5pp	Growing recognition

N₂O again stands out as an interesting finding: more respondents say N₂O needs more philanthropic resources (40%) than currently work on it (26%). The field is already telling us that N₂O is under-resourced relative to its potential.

Food and Agriculture also deserves mention: 55% of respondents say it should be a priority for additional resources, making it the second-highest area after methane. This was not a category in 2024's resource priority question. Its prominence here reflects practitioner interest in both agricultural methane and N₂O from soils.

55%

say Food and Agriculture should be a priority for additional resources

second-highest area after methane

57%

have experienced gaps in the regranter or intermediary ecosystem

by geography and by pollutant

The regranter gap: most have experienced it

57% of respondents say they have experienced gaps in the regranter or intermediary ecosystem or areas where no intermediary organisation covers their work. Open-text responses locate these gaps primarily by geography (Global South coverage) and by pollutant (N₂O, ozone, and black carbon outside major markets).

5 The Global South gap is structural, not incidental

2026 was the first year our survey reached a meaningfully global respondent pool. What those respondents told us about their experience of the field was consistent and specific.

What Global South respondents told us about barriers

- Funding arrives through too many intermediaries, increasing transaction costs and reducing local ownership.
- Organisations are often excluded from strategic decisions made by Northern coalitions, even when those decisions directly affect their regions.
- Language barriers remain real — grant applications, technical dialogues, and coalition communications are primarily in English.
- Local regranting mechanisms are sparse. Most funding from international philanthropy reaches Global South organisations through Northern intermediaries, not through regional ones.
- High administrative burdens disproportionately affect smaller, Southern-based organisations with limited capacity for compliance.

What SPAA did with these findings

We are committed to actively using the survey findings to shape our work.

AT THE JUNE 2026 FUNDER MEETING

Your survey responses were presented alongside SPAA's funding landscape analysis at a full-day convening of 16 philanthropic funders in London. SPAA will continue to convene and grow this Funder Circle group and provide ongoing insights about the super pollutant ecosystem. The conversation in June focused primarily on the following insights:

Collaboration and coordination increased, and strategic implementation became the largest need — Respondents citing moderate-to-effective collaboration rose from 66% to 92%; 57% say the field is more coordinated than 12 months ago (13% say less coordinated). The most-cited additional collaboration needs have shifted away from advocacy, communications, and lessons-learned (down ~30% each) towards strategy implementation (+~10%).

The regranter gap — 57% of organisations reporting regranter ecosystem gaps translated into a direct conversation about the strategic implications of intermediary infrastructures.

The 'fund longer' and with more coordination ask — The consistency of open-text responses about multi-year unrestricted funding with greater strategic coordination across funders was well noted.

WHAT SPAA COMMITTED TO

SPAA left the June 2026 convening with these specific commitments:

Coordinated funder engagement — Support Funder Circle members in approaching regranters with aligned dual decarbonization and super pollutant asks rather than fragmented individual approaches.

Internal education support — Provide presentation materials and join sessions for any funder team bringing the super pollutant case to their board or leadership.

Underdeveloped areas philanthropic strategies — Continue building philanthropic strategies in the most underdeveloped areas across the super pollutant field.

Longitudinal tracking — Run this survey annually so that funders and the ecosystem can see, over time, whether it is genuinely strengthening and identify issues and gaps.



ONGOING ENGAGEMENT

Ongoing engagement

This survey works best as a longitudinal tool if the same organisations participate over time. We are committed to running it annually, and we are asking you to participate again in 2027. Before then, we welcome hearing if any of the findings contradict your direct experience in the ecosystem. If you have input on the process or findings, we want to hear from you.

If we got something wrong in this report — tell us. If a finding misrepresents your experience or the experience of organisations you work with, we want to know.