



The European voice of the
adhesive and sealant industry



CONNECT

FEICA NEWS & VIEWS



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The FEICA 2019 European Adhesive & Sealant Conference and EXPO brought together manufacturers, formulators, suppliers, distributors, service providers and members of the academic community to Dubrovnik in Croatia over the course of three days. The event, which took place from 11 to 13 September 2019, is the most important happening for the adhesive and sealant industry in Europe, providing insights into all the key issues impacting it, such as sustainable growth, innovation and digitalisation. One of the main threads through FEICA 2019 was how innovations in adhesives and sealants can help solve some of the biggest issues facing our planet by improving product efficiency and circularity, therefore creating a more sustainable society.





The theme of this year's business forum was 'Driving growth in volatile times through sustainable supply chain management'.

Four top keynote speakers talked about a range of topics, from sustainable business models for adhesives and sealants companies, to feedstock costs and availability. The Breakout topics included 'Innovation in construction' and 'New raw material concepts for polyurethane'.

This year's brand-new Master Classes ranged from 'Turning volatility into your comparative advantage' to 'Rewiring the adhesive and sealant supply chain with blockchain'.

Delegates can download all the presentations from www.feica-conferences.com.



ON FEICA 2019:

'I found FEICA really visionary and the programme was very well designed'.

Safia Minney, Founder and former Global CEO of People Tree

'I would like to thank all FEICA crew for the Dubrovnik event and the top-level presentations. For a start-up company as we are, being able to get involved in the leading association for A&S was extremely satisfactory'.

Jordi Arbusà, Head of Development, GLOO

The FEICA Seminar

The 2019 FEICA Members' Seminar, 'A Business Perspective on Regulatory Challenges', focused on Turning OCF Test Methods into CEN standards, Regulatory pressure on critical raw materials, Global challenges for packaging adhesives, Poison Centres, and Rapid response in regulatory affairs.

If you are a member of FEICA, and work in management, business development, R&D, or even regulatory affairs, this is the yearly seminar to attend.

The FEICA Seminar provides a concise summary of some of the activities undertaken by the Technical Working Groups and Task Forces to support members & the whole industry in general.

Please Save the Date for the FEICA Seminar 2020, which will take place on 9 September 2020 in Warsaw, Poland.





CONNECT interviewed some of the Speakers at FEICA 2019 to get further insight into some of the topics featured at the conference. We are happy to share these insights with our readers.

Key Note speaker Safia Minney, MBE, challenged delegates to 'dig deep' into their supply chains.

Safia Minney is an award-winning social entrepreneur and founder of People Tree, the pioneer of sustainable fashion. She now leads a consulting business promoting leadership for sustainable business and responsible supply chains.

During her Key Note speech, Minney examined the challenges business leaders need to consider when developing a business that is truly "sustainable" in a broad sense when faced with climate change. These aspects include not only those that the adhesive and sealant industry will already be familiar with, such as safe and sustainable raw materials and reducing plastics pollution, but also issues such as the the United Nations' 17 "Sustainable Development Goals", which cover aspects such as poverty, hunger, clean water, climate change, biodiversity and education.



Minney then outlined an action plan to help businesses become part of the solution:

- Gain organisational buy-in.
- Embed climate change into your strategy. Set short-, medium- and long-term dates by which your business will radically reduce its overall carbon footprint and assign responsibility to a dedicated "just transition team".
- Set science-based targets and recognise that to meet them will require a deep transition in business model.
- Enable action. Empower your employees to become activists and support them in using their power to push for change in the spaces where they have influence.
- Gather support. Share your journey and encourage others in your industry and beyond to declare a climate emergency.

We talked to Minney and asked where our industry can make a difference. "Look for where in the supply chain you can cut carbon. Also, look for supply chain efficiencies everywhere; dig through all the layers of the supply chain and take a robust approach to all sustainable development goals. In addition, we have found that, although the consumer is price sensitive, they are willing to pay a certain premium. Outstanding products can make things perform better and last longer. Look therefore for the 'missing ingredient' that can help reduce waste and increase the longevity of products."

Electrolux's view of circular challenges and opportunities for appliance makers

Another Key Note speakers at FEICA 2019 was Karl Edsjö, Director of Resource efficiency policy and recycling at Electrolux Group. Karl focusses on sustainable materials and new business models.

During his presentation in Dubrovnik, Karl reviewed Electrolux's long-standing commitment to the circular economy and explained the Company's current efforts to reduce climate impacts and resource consumption. These include innovative solutions that go beyond the selling of products.

Electrolux has thoroughly reviewed its value chain, from raw materials, through manufacturing and distribution, to a product's sale, use and end-of-life.

It explored circular business options along the entire value chain and started by focusing on those with the biggest potential impact on sustainability.

The first area Electrolux looked at was how to use more recycled materials in its product. Its Vac from the Sea range of vacuum cleaners use 70% recycled plastic gathered from the oceans and have won an award from the United Nations.

<https://www.electroluxgroup.com/en/electrolux-and-vac-from-the-sea-awarded-by-united-nations-12115/>

This is an important step because materials are the second biggest contributor to its products environmental impact (after product use). It also makes good business sense because the recycled materials currently have a lower and less volatile cost than virgin materials.



"Vac from the Sea" range of green vacuum cleaners.

'We need to expand the use of recycled and novel materials, and develop innovative modes of product use'



Electrolux also developed a refrigerator prototype where all the visible plastic parts are made of bioplastics from renewable sources. The bioplastic for the refrigerator has a more than 80% lower carbon footprint compared to the conventional plastics used today. Unlike ordinary oil-derived plastics, bioplastics come directly from renewable resources, such as corn or sugarcane. The bioplastics used in the refrigerator are recyclable.

Moving down the value chain to product use and end-of-life, Electrolux is launching some innovative new ideas:

- Product leasing: Products such as vacuum cleaners and washing machines can be leased with a payment scheme based on square meters cleaned or number of washes respectively.
- Product refurbishment and lifetime extension: Products can be repaired and refurbished to extend their lifetime.

Adhesive and sealant manufacturers will need to ensure that their products are compliant with all relevant legislation of course. But in addition, they will need to develop products that facilitate convenient repair, refurbishment and recycling of appliances. www.electroluxgroup.com



Lionel Spack, Senior Food Contact Materials Expert at Nestlé Suisse, spoke at the FEICA 2019 Business Forum about Adhesives for food contact packaging: New challenges for recyclability

During his presentation, Spack emphasised how much he appreciated FEICA's work and cooperation. He also touched upon topics like Mineral Oil, CPI paper and board guidelines and Cyclic Esters, and stressed that the near future focus of Nestlé will be to maximise on paper packaging as opposed to plastics packaging.



Vitaly Rogachevsky, VP C5 Monomers and Polymers at Argus Media, presented his Key Note on the present and future state of chemical raw material supply.

All FEICA 2019 delegates can download the presentations via the 2019 proceedings www.feica-conferences.com



Inaugural Conference Masterclasses at FEICA 2019 - The Conference Survey confirmed the three presentations were a great success!

Launched at the 2019 FEICA Conference and EXPO in Dubrovnik, Masterclasses are a brand new feature designed to provide experts in relevant fields with an opportunity to share their in-depth knowledge of a specific technical or business topic.

Three experts gave focused classes of 45 minutes each. This year's topics were:

- Turn volatility into your comparative advantage - Kjetil Sandermoen
- Rewiring the adhesive and sealant supply chain with blockchain- Maciej Jędrzejczyk
- Looking for perfect adhesion? Turning the holy grail into reality" - Maurice Brogly

CONNECT spoke with Professor Maurice Brogly to get his views of the concept and learn more about the topic of his Masterclass. Maurice Brogly is a Full Professor at the University of Haute Alsace in Mulhouse, France, where he heads the Chemistry and Physical Chemistry Polymers (CPCP) Research group in the Laboratory of Photochemistry and Macromolecular Engineering (LPIM).

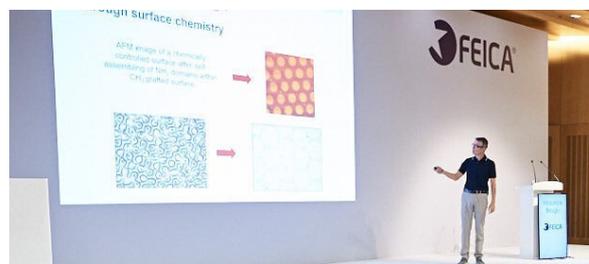
In his Masterclass session, titled, Looking for perfect adhesion? Turning the holy grail into reality, Prof. Brogly examined the multidisciplinary, multitechnical solutions to fundamental questions about adhesive such as, how do you measure it? How do you control it? What are the roles of mechanical interlocking, intermolecular forces, and actual contact area between adherents? What are the dissipative and rupture mechanisms activated during the separation of an interface or an interphase? Using practical "business" examples, he provided a current panorama of the concepts and experiences to master in order to control adhesion.

CONNECT: As you know, Masterclasses are a new feature this year at the FEICA Conference. What do you think of the concept?

MAURICE BROGLY (MB): I think they are a great idea. FEICA events can naturally be quite "business-oriented" because of the wide range of challenges it deals with, so it's great to have an opportunity to dive deep into some more technical material.

CONNECT: What are you going to be looking at and what special insights can you bring to our delegates?

MB: I'm going to look at the seemingly simple topic of "What are the main things to consider when facing an adhesive challenge?" I will bring the perspective of a scientist who has had more than 25 years' experience working with industrial partners in the adhesives and sealants field. During this time, I have found that, although they know their products extremely well, which is to be expected, when a product fails, they often do not fully understand exactly why it failed. I can help them get to the root cause of the problem.



According to Prof. Brogly, a "back to basics" approach provides an effective methodology to tackle adhesive problems, whatever the adhesive in question. If businesses are interested in this approach, his team is available to work with them to help analyse their specific bonding challenges. Please contact: maurice.brogly@uha.fr

CONNECT: Can you explain this in more detail?

MB: Yes, let's assume that an adhesive joint fails and you want to understand why. To do this, you need to identify the exact place where the failure occurred. Was it the adhesive? The substrate? Or the interface? To accurately identify the locus, you need a multiscientific, multitechnical and multiscale approach. In more detail: The science of adhesives and sealants is multidisciplinary, so we need chemists, physicists and possibly biologists and surface scientists. We need to use a variety of techniques to assess the failure. And we need to examine it from the nano to the macro scale to ascertain whether there are differences. Then, when you understand where the failure is, you can develop an appropriate solution to the problem.

CONNECT: How do you respond to businesses who may be nervous about sharing such sensitive intellectual property with third parties?

MB: We have worked with industrial partners for 25 years and have demonstrated that it is possible to preserve confidentiality, even though we are an academic partner. We can publish knowledge and the business can patent it.

CONNECT: Finally, what was your impression of the FEICA Conference and EXPO?

MB: I have been really impressed with the quality of the discussions and the presenters. The event was very well organised and I firmly believe that everyone with an interest in A&S should be aware of the great work FEICA does on behalf of the industry.

FEICA 2019 on Social Media



ASI Magazine @ASIMagazine · Sep 30
The recent **#FEICA2019** brought together **#adhesives** and **#sealants** manufacturers, formulators, suppliers, distributors, service providers, and members of the academic community. What were some highlights? adhesivesmag.com/articles/97243...



Maciek Jędrzejczyk · 2nd
Blockchain Leader (Central and Eastern Europe)
2d · Edited

I was honoured to teach the Blockchain Masterclass to business leaders in adhesive and sealant industry at **FEICA 2019 Conference** in **#Dubrovnik**. The objective of this session was to introduce **#blockchain** to the wider business audience and explain how this technology already brings practical business benefits across six supply chain and manufacturing areas: product safety and authenticity, supply chain optimisation, finance, operational processes, promotional strategy management, and customer engagement. During the class we analyzed potential and realised business benefits that might provide a competitive edge to trailblazers in this industry, such as time and cost savings or risk reduction, as well as opportunities arising from the creation of new business models or the disruption of the industry. Overall, it was a great experience to brainstorm together about how technology and innovation can bring the value with representatives of some leading industry leaders sitting in a single room.



Luc Thys @LucThys · Sep 12
This slide by Karl Edsjö (**#Electrolux**) nicely summarizes what's it all about: Sustainable Industry Activities with respect for our planet and future generations! **#feica2019** @FEICA_news #circulareconomy



INSOCO S.L. @InsocoSL · Sep 13
Interesantes **#masterclass** en el último día de **#FEICA2019** @FEICA_news **#LEADERSHIP** **#volatility** **#blockchain** **#liderazgo** **#adhesives** **#sealants** **#dubrovnik**



H.B. Fuller @GlueTalk · Oct 4
2019 **@FEICA** Conference in numbers: 3 days, 650 participants from 34 countries, more than 40 speakers, 50 exhibitors. We're happy to participate in this lively forum at Dubrovnik. Watch the video. **#FEICA2019**



FEICA 2019 Conference and EXPO
2019 European Adhesive and Sealant Conference & Expo, Valamar Lacroma Dubrovnik Hotel, Dubrovnik, ...
[youtube.com](https://www.youtube.com)



FEICA's European Executive Board (EEB) elected a new FEICA President, Roland Albers, Senior Vice President Europe (Bostik) and a new Vice-President, Guido Cami (AVISA). The fully updated FEICA European Executive Board organigram is available on: <http://www.feica.eu/about-feica/organigram/executive-board.aspx>

Left to right (front and middle): Dr Eva Griessbach (Dow Silicones Belgium sprl), European Technical Board Chair | Philip Bruce, FEICA Secretary General | Dr Silvio Bassi (Coim) | Dr Boris Tasche (IVK) | Stuart Jenkinson (H.B. Fuller) | Idil Yurdakul Peker (Dow Europe) | Phillip Lee (BASA)

Left to right (back) | Guido Cami (AVISA), FEICA Vice President | Roland Albers (Bostik B.V.), FEICA President | Eric Dehasque (Sika), FEICA Treasurer | Jean-Marc Barki (AFICAM) | Rob Uytendewillegen (Bolton Adhesives)

New FEICA members!

SAPICI SpA
Direct Company Member
Bergamo 2
20063 Cernusco S/N
Italy
www.sapici.it



Momentive Performance Materials GmbH
Affiliate Company Member (ACM)
Chempark, Geb. R20
51368 Leverkusen
Germany
www.momentive.com



An exhibitor's perspective of the FEICA Conference & EXPO

'We met decision-makers from adhesive and sealant companies, both large and small' - Michael Schwab, UTH GmbH Sales Engineer

Every year, the FEICA EXPO provides suppliers of raw materials, equipment and services with a unique opportunity to get in front of key decision-makers from the adhesives and sealants industry. This year's EXPO attracted a record number of exhibitors, and with a record number of delegates, the EXPO area was consistently busy. CONNECT spoke to several exhibitors during the EXPO to see how they were getting on. Here are some excerpts of what was said.

Haltermann Carless

Haltermann Carless supplies high-value hydrocarbon solutions used in diverse industry sectors – from automotive to pharmaceutical to the construction market. Its low-viscosity base oils are used in the silicone sealants industry (acetoxo and alkoxy applications).

We met Jan Boerrigter, Commercial Manager, Middle Distillates, who told us "We attended last year's FEICA Conference and EXPO in Riga, but this is the first time we have exhibited. It has been very successful for us and there has been a lot of interest from delegates in our advanced solutions for silicone sealants, as well as in our 'Hydrogenation 2020' investment project."

JPB Industry

JPB Industry manufactures fully integrated 4.0 turnkey systems for the packaging of hot melts, including pillow packaging machines. A regular exhibitor, JPB Industry launched its new bag packaging machines at this year's EXPO for some hotmelts, coldflow products and very low viscosity polymers for high outside temperatures during warehousing and transportation, etc. We caught up with JPB Industry's President and CEO François-Xavier de Thezy, who told us, "JPB has exhibited at the FEICA Conference and EXPO every year since Izmir in 2013. I like the format of the EXPO; it's three days of specialised visitors with no 'time-wasters'. We get to meet the key contacts – the real decision-makers with genuine interest in our pillow packaging machines and processes. I also like the fact that all exhibitors have the same tabletop booths, so we all look equal; a small company can look the same as a huge multinational. It's a great show and we will definitely exhibit next year in Warsaw!"

Join other successful exhibitors in Warsaw in 2020! If you're interested in promoting your products or services to decision-makers in the adhesives and sealants industry at the FEICA Adhesive & Sealant Conference and EXPO in Warsaw next year, please contact info@feica.eu.

Everyone attending the FEICA event can have their say by filling in the yearly survey. This also gives you the chance of winning a gift and a free registration for the next FEICA Adhesive & Sealant Conference and EXPO. This year's winner is Dorothea Müschenborn from PCC Specialties GmbH!

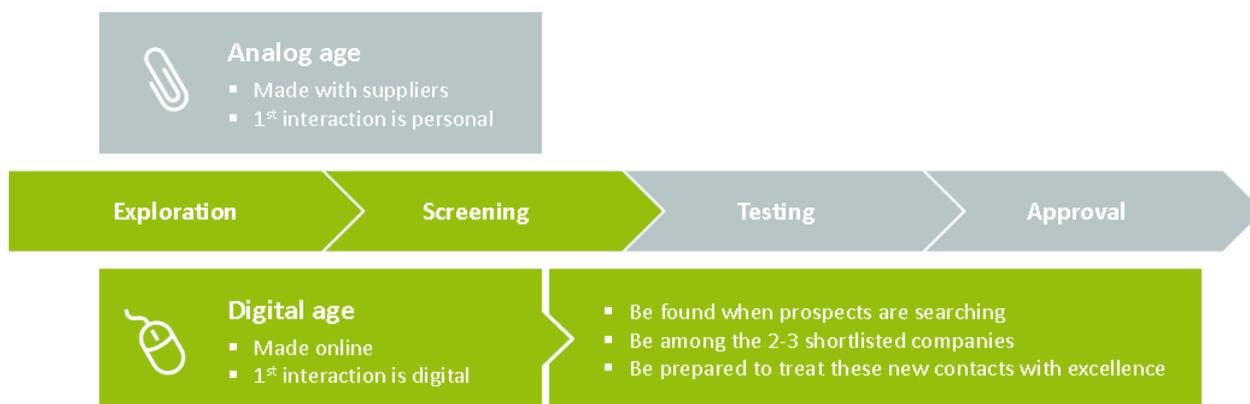


FEICA 2019 in pictures



Watch the conference video on www.feica-conferences.com

The challenges of digitalising your business: Practical insights from Christophe Cabarry, Founder and CEO of SpecialChem, at FEICA 2019



In the previous issue of CONNECT (available at www.feica.eu), we talked with Christophe Cabarry, about his forthcoming presentation at the 2019 FEICA Conference: "Implementing B2B digitalisation - What are the top challenges and how do you overcome them?"

Following on from his presentation at last year's Conference, in which he looked at why companies need to embrace digitalisation, this year he shared some practical insights into the most common challenges businesses face when digitalising and their solutions. According to Cabarry, the challenges he sees most often when working with B2B businesses fall into four main categories:

- Organisation
- Resources
- Tools and systems
- Management mindset

Digital has changed the buying process of specialty chemicals.

Organisation

Cabarry maintains that in the digital world, success requires rapid experimentation and quick implementation. Digitalisation is not just an IT project or simply "digital marketing". You can't just install a CRM and say "Great – we're digitalised now!"

The organisation problem is linked to the resources challenge. The digital maturity of an organisation – in terms of people resources and acquiring new skills – needs to grow at the same speed as its digital complexity. If the complexity grows faster than the maturity, you won't be able to exploit the full potential of your software and your employees will feel lost. If the maturity grows faster than the complexity, your teams will be limited by your tools and processes and will likely become demotivated.

Resources

Many companies attempt to embark on digitalisation using only their existing staff. We have found that "injecting" some digital maturity into the organisation by adding some external people to the team.

Tools and systems

Today we have the option of web-based "software as a service" (SaaS), which offers vastly improved agility. You don't own the software, you "rent" it. It is quick to configure and connect, but if it doesn't work, you can rapidly move to an alternative. The challenge here is integration. Your data should not be "stuck" in one piece of software; it should be in data warehouses or "datalakes". This enables data to be accessed through a range of systems, facilitating useful, in-depth analyses.

Management mindset

In our experience, there are now very few managers who do not recognise the need to digitalise. However, they often do not know how to approach it because the subject is complex and far-reaching, touching on every area of the business. My recommended approach is first to ensure effective change management to instil a sense of urgency. Create a solid high-level plan with day-to-day agility and a few high level KPIs that guide every action. Be sure to give the digital team the freedom to experiment.

Cabary illustrated these points with a case study detailing the results achieved by a business after successful digitalisation.

<http://business.specialchem.com/acton/media/23126/marketing-services-in-chemicals>



The new FEICA brochure: showcasing our industry's contribution to the economy and circular economy

The global market for adhesives and sealants reached a value of 54.5 billion euros in 2018, with Europe holding a share of 30.8%. In addition, adhesives and sealants can improve product efficiency and circularity to help create a more sustainable society. This brochure shows not only what we do as an association, but also the overall significance of our industry.

The brochure is available for download at www.feica.eu



Adhesives and Sealants

Enablers of a sustainable society



The European adhesive and sealant market 2018

End-user sectors



Source: FEICA - Smithers European Adhesives and Sealants Market 2019 - 2024

The European Adhesives & Sealants Market 2019-2024



The sixth edition of the FEICA market study programme titled 'The European Adhesives and Sealants Market: A quantitative demand analysis and trend forecast' (prepared by Smithers on behalf of FEICA), was launched at FEICA 2019.

The FEICA brochure as well as the description brochure and order form for the Market Report are available on www.feica.eu

The FEICA Market Report covers the window from 2014 - 2024, providing a review of the period and forecasts. Data was gathered through primary research, comprising interviews with more than 100 companies active in the adhesives and sealants industry, including formulators, raw materials producers and equipment suppliers. The analysis was carried out independently by Smithers (www.smithers.com).

The geographic scope of the study encompasses Europe, including Western Europe, Central and Eastern Europe (CEE) plus Turkey. The European region is split into 16 regional markets, which are analysed by market segment and product category.

The study follows the harmonised FEICA-ASC-CATIA Adhesives and Sealants Classification Manual. Furthermore, the 200+ page report is structured to facilitate international comparisons between Europe, NAFTA and the Asia-Pacific region. The markets of the latter two regions are analysed in separate companion reports offered by the Adhesive and Sealant Council (ASC).

The Market Report was presented at FEICA 2019 by Jan Ramakers, Associate Consultant at Smithers, who provided an overview of developments in the market, examining trends in sales volumes and values, as well as demand by end-use segment, product group and geography.

CONNECT spoke with Ramakers after his presentation to get some further insights into the report. He outlined four key areas that will influence the adhesives and sealants market over the coming years:

Technological trends: According to Ramakers, "The analysis reveals that hybrid systems, combining the beneficial characteristics of two different adhesive systems, are being used in more and more applications.

continued on next page

The construction industry, for example, has traditionally had a plethora of adhesive and sealant products. This makes it complex to select the ideal product for a particular application and can lead to errors. As a result, hybrid systems of urethanes or polyurethanes combined with silicones or acrylics, which provide excellent performance across a wider range of applications, are growing in popularity. Silane-modified polymers are well-known, and their use is increasing rapidly as well. They are also finding application in premium tyre brands, where they bring improved product performance. It is also easier to create tailor-made products from hybrid systems because it is easier to manufacture small batches."

Green trends: Ramakers said, "The research confirms that solvent-based systems will continue to decline and will be eliminated as alternatives in price and performance are found. The driving force here is not only legislation, but also demands from customers and consumers."

Economic trends: "Forecasts are difficult here", contends Ramakers, adding, "The industry has been growing at GDP or slightly above, which is what you would expect from a mature industry. However, we have Brexit and the US / China trade disagreements, the outcomes and implications of both of these are very difficult to predict. In fact, these have already had an impact on adhesive and sealant investment and demand and led to production volatility."

Chemicals legislation: "Legislation continues to pose challenges for the entire chemicals industry", says Ramakers, "Developments in the Biocidal Products Regulation (BPR) can potentially have major impacts. For example, if a particular biocide is banned and an effective replacement cannot be found, certain adhesive and sealant products could just disappear from the market! Of course, REACH will also continue to raise issues, especially if the UK leaves the EU and sets up its own version of REACH."

You can get the whole story in the European Adhesives and Sealants Market Report!



In order to encourage younger adhesive and sealant professionals to attend the FEICA conference, the FEICA board proposed that we encouraged our National Association Members to offer a competition to give young scientists from their membership the opportunity to join industry professionals in Dubrovnik free of charge. FEICA took all charges upon itself and as a result 20 young winners from various European countries attended the event! Laura Humphries from F Ball and Company Ltd said 'Thank you BASA (British Adhesives and Sealants Association) and FEICA for the opportunity to attend FEICA 2019 in Dubrovnik. It was a superb event!'

New FEICA article published in the European Coatings Journal (ECJ) and Farbe und Lack

In April and August 2019 respectively, ECJ and Farbe und Lacke published the FEICA article 'Towards a Circular Economy' (Auf dem Weg zur Kreislaufwirtschaft). In it, FEICA explains how the adhesive and sealant industry continues to innovate to become more sustainable. The circular economy concept creates a paradigm shift for many important sectors of European industry; successfully addressing the challenge of a circular economy is best secured if all of society is encouraged to contribute.

You can read the full articles in English and in German via the FEICA website at www.feica.eu



Circular Plastics Alliance

FEICA attended the high-level event of the Circular Plastics Alliance on 20 September 2019, in Brussels, where the Circular Plastics Alliance presented and adopted its declaration. Ten million tonnes of recycled plastics will be integrated into products in the EU by 2025. Check out the FEICA Sustainable Development Agenda here: <http://www.feica.eu/our-priorities/sustainable-development.aspx>





FEICA will soon launch its second Adhesion Innovation Award

Young researchers - including masters or doctoral students, post-docs and junior professors - working in adhesion science in Europe, and who have published outstanding work, will once again be invited to apply for the FEICA/EURADH Adhesion Innovation Award.

More on this in the January 2020 issue of CONNECT or on www.feica.eu soon!



FEICA European Adhesive & Sealant Conference and EXPO 2020

Warsaw, Poland

9-11 September 2020

Marriott Warsaw, Poland

SAVE THE DATE



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FEICA ON INSTAGRAM

FEICA CONNECT is the quarterly newsletter of the Association of the European Adhesive and Sealants industry.

The next issue will be published in January 2020. Please note that FEICA CONNECT is published four times a year; in January, May, June/July (Special Conference Issue) and in October.

FEICA thanks the authors who have contributed to FEICA CONNECT.

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