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FEICA NEWS

The European voice of the adhesive and sealant industry

The FEICA European Market Report

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THE EUROPEAN ADHESIVES AND SEALANTS MARKET REPORT 2021-2026

FEICA publishes the 7th edition of its highly regarded market study

The latest edition of the FEICA Market Report, which covers the window from 2021 to 2026, again provides indispensable insights to help companies better position themselves for success in today's challenging business environment. The market knowledge, obtained by direct interviews from the adhesives and sealants industry (formulators, raw material producers, equipment suppliers), is analysed by Smithers and published by FEICA. This International study provides the industry's benchmark data post-COVID.

The FEICA industry standard: EU study on adhesives and sealants

The geographic scope of the study encompasses Europe, including Western Europe, Central and Eastern Europe (CEE) and Turkey. The European region is split into 5 regional markets, which are analysed by market segment and product category.



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The report is the only adhesives and sealants study based on primary research, drawing its data from direct interviews with stakeholders in the adhesive and sealant industry. As such, it has established itself as the industry's definitive European reference guide.

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The first FEICA European market report was issued in 2005. In 2019, the sixth edition of the report was published, covering 2019-2024. Due to the COVID-19 pandemic, a seventh edition that covers its impact on the EU market, was commissioned in 2021.

The study follows the harmonised FEICA-ASC-CATIA Adhesives and Sealants Classification Manual. In addition, the 200+ page report is structured in such a way as 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 size is defined for the year 2020 and a demand forecast for the period 2021-2026 is also provided.

The European adhesives and sealants (A&S) market was 4.7 million tonnes with a value of 15.5 billion in 2020. The market declined by 5% in volume and value in 2020.

However, the European A&S market is forecast to grow to €22.2 billion by 2026, at a compound annual growth rate (CAGR) of 3.6% for 2021-26.

[Click here to view brochure & order form](#)



NEW FEATURE: REGIONAL REPORTS

For the first time, FEICA offers Regional Reports, which can be purchased instead of the full programme. These reports are intended for companies which focus on regional markets only. Please click on the images for information on pricing.

The regions are:

- Austria, Germany Switzerland
- Benelux, France, Great Britain, Greece, Ireland, Malta
- Nordics
- Italy, Portugal, Spain
- Czech and Slovak, Hungary, Poland, Russia, Turkey, Other Eastern Europe (CEE)

'In the upcoming years, there will be a continued strong demand for safe, recyclable, sustainable adhesives and sealants products, where price and quality remain key'.



PU TRAINING PLATFORM LAUNCHED

On 4 August 2020, a new restriction on diisocyanates under REACH was adopted by the European authorities, specifying the need for training and labelling requirements for industrial or professional users of diisocyanates (individually or in combinations) with a monomeric concentration greater than 0.1 % by weight.

Training will be mandatory for industrial and professional users of diisocyanates in the EU from 24 August 2023. The restriction can be found in all EU languages via EUR-Lex, the European Union's website offering access to EU law. This new restriction also specifies the need for labelling requirements and applies to any activity where exposure to diisocyanates may occur. It does not apply to PU products used by consumers. A separate restriction regarding consumer products has already been implemented.

Training and certification, which involves passing an examination, must have been completed by 24 August 2023. Records of the training given to employees must be maintained by employers. Every five years, renewal of the training will be necessary.

FEICA, in coordination with the European Diisocyanate & Polyol Producers Association (ISOPA), the European Aliphatic Isocyanates Producer Association (ALIPA), and several other industries in the polyurethane industry, has been working hard to organise a comprehensive training programme to ensure the safe use of diisocyanates for producers and professional users all over Europe.

In this way, FEICA ensures that all end users of PU-containing adhesives and sealants across Europe continue to handle diisocyanates safely. A PU Training Platform has therefore been launched and can be reached via www.safeusediisocyanates.eu. The training programme is available in English and is accessible in the entire EU. Training will be available in German from 1st December 2021 and in every EU language by the middle of 2022.

The FEICA European Executive Board made the decision to financially support the training of professional and industrial users of polyurethane (PU) adhesives and sealants. By using a FEICA voucher code, the web-based training for adhesives and sealants applications (priced at 5 euros per user/certificate) will therefore be free of charge. Please see www.feica.eu/PUinfo. The training material will also be made available for individual classroom training.

Regarding labelling, from 24 February 2022, the following sentence/label, or similar, should appear on products to be used industrially or professionally having a total monomeric concentration greater than 0.1 % by weight:

'As of 24 August 2023, adequate training is required before industrial or professional use of this product'.

To facilitate adhesive and sealant companies to comply with the information provision requirement, the FEICA information webpage www.feica.eu/PUinfo was created to provide users with additional information on the training and will also be updated regularly. A link to this webpage (or QR code) can be added to adhesives and sealants labels to direct to the training platform. More information is available via: www.feica.eu/our-priorities/safe-use-diisocyanates.



NEW FEICA BOARD ELECTED AT THE 2021 GENERAL ASSEMBLY (GA)

The FEICA GA takes place once a year and is attended by FEICA's membership. FEICA's direct membership has voting rights. The 2021 hybrid edition was held on 15 September 2021 and was opened by outgoing FEICA President, Roland Albers, who explained how FEICA, more than ever, addresses the current market situation of our industry.

A new board was then elected with Dr Guido Cami (AVISA) elected as the next FEICA President, Mr Eric Dehasque (Sika) as new Vice President and Mr Jean-Paul Hautekeer (Dow) as new FEICA Treasurer. Dr Eva Griessbach (Dow) remains the FEICA European Technical Board (ETB) Chair.



At the new FEICA offices: left to right - Lars Christensen (Dana Lim), Mr Stuart Jenkinson (H.B.Fuller), Dr Guido Cami (AVISA), Mr Eric Dehasque (Sika), Mr Roland Albers (Bostik), Dr Eva Griessbach (Dow).

The new executive board was complemented with: Representing the Direct Company Members (DCMs): Dr Boris Tasche (Henkel); Mr Rob Uytendewilgen (Bolton Adhesives); Mr Roland Albers (Bostik); Mr Stuart Jenkinson (H.B.Fuller); Mr Alessandro Passerini (Coim). Representing the National Association Members (NAMs): Mr Jean-Marc Barki (Sealock) AFICAM; Dr Boris Tasche (Henkel) IVK; Mr Phillip Lee (Ace Adhesives) BASA; Mr Lars Christensen (Dana Lim) DFL.

Dr Eva Griessbach (Dow), FEICA ETB Chair, then presented the ETB report, followed by FEICA's Secretary General, Kristel Ons, presenting the Secretarial report. The full presentation is available from the FEICA Extranet.

We thank Roland Albers for his two-year tenure as FEICA President and wish a warm welcome to the new President, Vice President, Treasurer and all members of the FEICA board.

50 FEICA® 2022

FEICA European Adhesive & Sealant Conference and EXPO 2022

14-16 September 2022
Grand Elysee, Hamburg



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FEICA-COMMISSIONED STUDY ON THE SAFETY OF PACKAGING HOTMELTS

Laboratory Lommatzsch & Säger will publish a study of interest to the food packaging value chain and regulators. The study, which was commissioned by FEICA to look into the potential migration of mineral oil hydrocarbons from typical packaging hotmelts and is titled 'Extraction, migration simulation and storage test regarding oligomeric hydrocarbons from hotmelt adhesives used in cardboard packaging'.

The purpose of the study was to determine the safety of hotmelts in adhesives applications, specifically in cardboard food packaging. The conclusion was that all investigated hotmelts were safe for use in the tested application. The study used a systematic approach to examine the migration from hotmelt adhesives and considered relation and correlation factors.

Typical hotmelt raw materials are comprised of polymers (polyolefins), paraffinic waxes (to adjust the melt flow index or viscosity), hydrocarbon resins (tackifiers, to increase stickiness) and additives (to add colour and fragrance). These materials are not mineral oil although the raw materials partly contribute to MOSH (Mineral oil saturated hydrocarbons) / MOAH (Mineral oil aromatic hydrocarbons) fractions in LC-GC-FID (liquid chromatography-gas chromatography with flame ionisation detector) analysis. When further analytical techniques are applied (e.g. GCxGC-TOF-MS), it is possible to distinguish these hydrocarbon fractions from real mineral oil hydrocarbons (MOH).

Three approaches were used in the study: extraction of hotmelt, migration simulation of hotmelt (gaseous phase) and real storage tests (food in a cardboard box sealed with hotmelt). Relationships and comparisons of the results of the tests were also considered. As expected, extraction was determined not to be a meaningful approach to estimate migration because this approach severely overestimates reality. In the extraction approach, the total of the available hotmelt hydrocarbons is shown, not just the part that could migrate. Real storage tests on the other hand are prohibitive because they take too much time to carry out. The study could show that simulation is the preferred way forward. Migration simulation is able to correctly calculate the hydrocarbons present in the migration of saturated hydrocarbons and aromatic hydrocarbons, that is, the MOSH and MOAH fractions.

A calculation model, furthermore, was developed based on MPPO (Modified polyphenylene oxide) migration simulation (Tenax®, 40 °C, 10 days). The model predicts real migration in terms of indirect contact concerning storage of dry foodstuff for 12 months at room temperature. The model will help prevent testing set-ups that are inappropriate and interpretations that are incorrect.

In summary, all investigated hotmelts (typical food packaging hotmelts), were demonstrated in the study to be safe* for use in the tested application. The hotmelts would therefore meet BfR draft criteria concerning MOAH, if interpreted as mineral oil. Of the three methods used in the study, extraction provided no meaningful approach to estimate migration. Simulated real storage proved to be the best method.

*Safe here means that the hotmelts would meet BfR (Bundesinstitut für Risikobewertung) draft criteria concerning MOAH (mineral oil aromatic hydrocarbons), if interpreted as mineral oil.

Study on oligomeric hydrocarbons from hotmelt adhesives used in cardboard packaging



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FEICA ON GZS WEBSITE DURING SLOVENIAN PRESIDENCY OF THE EU COUNCIL

Slovenia holds the presidency of the Council of the EU from 1 July to 31 December 2021 and the FEICA Slovenian National Association Member (NAM) 'GZS - Adhesives Producers Association of Slovenia' created, for the occasion, a special webpage to position the industry.

FEICA is featured under the website's 'importance to the chemical industry' section.

Member states holding the presidency work together closely in groups of three, called 'trios'. The presidency is responsible for driving forward the Council's work on EU legislation, ensuring the continuity of the EU agenda, orderly legislative processes and cooperation among member states.

The current trio is made up of the presidencies of Germany, Portugal and Slovenia. Following these, France, the Czech Republic and Sweden will begin their presidency from 1 January to 30 June 2022. Their ideas will, in turn, influence Europe.

AFICAM CREATES NEW WORKING GROUP FOR PACKAGING ADHESIVES

AFICAM, the French adhesives and sealants association, has created a Packaging Adhesives Working Group (WG) to effectively handle and communicate with the authorities on regulations involving packaging adhesives in France. FEICA is delighted to have such a strong partner in France, especially now that France will take over the Presidency of the EU Council on 1 January 2022.

AFICAM and FEICA already have a long tradition of working together, and cooperation is not limited to the associations' staffs but also exists between the companies internally.

Many of the most important adhesives players have joined this new active AFICAM WG. Please join us in congratulating AFICAM on this initiative, as well as Pascal Peroni, Global Market Director, Consumer Goods & Paper - Advanced Packaging Adhesives at Bostik, who has been elected to Chair the group. For more information on AFICAM, please visit www.aficam.fr.



Mr Pascal Peroni



VALIDITY OF THE EXISTING FEICA MODEL EPDS EXTENDED TO 2022

Since 2015, FEICA has been offering Model EPDs which can be used by construction products manufacturers to prove the environmental impact of their products.

As the Model EPDs require updating after 5 years, FEICA started an initiative to update the EPDs in 2019, together with the EFCC (European Federation for Construction Chemicals), IVK (German Adhesives Association) and Deutsche Bauchemie.

Because of unexpected circumstances, the update process is taking longer than originally expected, and the Institut Bauen und Umwelt (IBU), the programme operator, has therefore supported the process by extending the validity of the existing EPDs.

We will notify our members of any new developments via the usual channels, and via the dedicated webpage on the FEICA public website, which has now been updated.

Much information, as well as a 'Frequently Asked Questions' section, is available via www.feica.be.



NOTIFICATION OF POLYMERS

Defining a reasonable, safe and efficient system for the notification of polymers

The European Commission is working to extend registration requirements for polymers, currently exempted from registration under EU REACH.

The Commission is considering requesting industry to notify of certain polymers' information. FEICA therefore produced a FEICA leaflet to explain why the notification of polymers should be limited to a concise dataset and analytical or test data should not be required at the notification stage.

This leaflet is available on the FEICA website here: www.feica.eu

More info on the Polymeric Precursors Exemption is also available via YouTube - please click below.



'MAF EXPLAINED' AVAILABLE IN EIGHT LANGUAGES

Under the Chemical Strategy for Sustainability, the European Commission plans to put a system in place that covers the combination effects of unintentional chemical mixtures.

Because of the complexity linked to regulating an almost infinite number of possible combinations of chemicals, the concept of a Mixture Assessment Factor (MAF) was launched, and FEICA created a leaflet detailing the MAF concept and consequences. See CONNECT Issue 45.

In support of our National Association members, this leaflet has been made available in 8 European languages on the FEICA Public website here: www.feica.eu

FEICA RESPONSE TO THE PUBLIC CONSULTATION FOR THE SIMPLIFICATION AND DIGITALISATION OF LABELLING

On 14 July 2021, the European Commission launched the public consultation on the Roadmap Inception Impact Assessment (IIA) on simplification and digitalisation of labels on chemicals to better communicate essential information about chemical products to users via innovative digital tools.

FEICA welcomes this initiative and thanks the Commission for the possibility to provide feedback. This initiative is of high relevance to the adhesives and sealants (A&S) sector because it would introduce changes for the labelling of a very broad spectrum of A&S products and A&S packaging.

A FEICA position paper is available via www.feica.eu and covers FEICA's response to the public consultation for the simplification and digitalisation of labelling.

NEWS AND VIEWS

The 'Essential Use' Concept

FEICA, partner of the Essential Use Concept Alliance, has co-signed a position paper together with 30 other associations in the chemical value chain supporting the debate on Essential Use.

In this paper, available via www.feica.eu, the Alliance points to the importance of regulatory efficiency and overall sustainability by carefully considering scope of applicability. It is available for FEICA members on the FEICA Extranet.



CROSS-INDUSTRY JOINT STATEMENT: A EUROPEAN AGENDA FOR EVIDENCE-BASED AND BETTER POLICY-MAKING

In April 2021, the European Commission published its new Better Regulation Communication aimed at improving EU policy-making.

FEICA, together with more than twenty European trade associations, strongly welcomes the principles and the objectives of the Communication. The associations co-signed a cross-industry joint statement on Better Regulation, aimed at providing recommendations to further improve the European policy-making process in the context of the busy policy agenda and ahead of crucial upcoming policy initiatives.

The letter is available via www.feica.eu.



Fostering Recyclability of Paper and Packaging

The European Coatings Journal (ECJ) published a FEICA article in their October 2021 issue. In it, FEICA explains that it has reached out to its stakeholders to encourage harmonised terminology and approaches to enhance recycling of paper and packaging containing adhesives. If you have an ECJ subscription, the October 2021 issue is available here. It is now also publicly available via:

www.european-coatings.com.

For more information, please see:

- FEICA position on biodegradability and compostability of packaging adhesives
- FEICA CONNECT Issue 41

'FEICA Hosts First Suppliers' Day'

ASI magazine covered FEICA's virtual Suppliers' Day on their website.

It is publicly available via:

www.adhesivesmag.com



Harmonised Rules: Review of the CPR

The European Coatings Journal (ECJ) published a FEICA article in their June 2021 issue on the review of the EU Construction Products Regulation (CPR). The purpose of the article is to raise awareness about the Construction Products Regulation (CPR) within the adhesives and sealants industry. If you have an ECJ subscription, the June 2021 issue is available here. It is now also publicly available via:

www.european-coatings.com.

For more information on the CPR, please see:

- FEICA position on the review of the Construction Products Regulation (CPR)
- FEICA CONNECT Issue 43



FEICA Commissions Study on the Safety of Packaging HMAs

SpecialChem has published a FEICA article on their website, available here. In it, SpecialChem highlights the FEICA-commissioned study on the safety of packaging hotmelts (see page 5).



FEICA SPEAKS AT CONFERENCES AROUND THE GLOBE

Dr Matthias Frischmann of Henkel AG & Co. KgaA, representing the FEICA Paper & Packaging Working Group, presented 'FEICA-Risikobewertung zyklischer Ester' at an online conference organised by Fraunhofer Institute for Process Engineering and Packaging on 19 October 2021.

The presentation covered FEICA risk assessment carried out on cyclic esters potentially formed from not fully cured polyester adhesives, intended to be used in food contact materials.

More on Cyclic Esters available via www.feica.eu

Kristel Ons, FEICA Secretary General, was invited to speak on the EU Green Deal at the 2021 ASC Adhesive & Sealant Convention (Annual Conference and EXPO) on 26 October 2021. The virtual presentation was titled 'Business Impact of Upcoming Regulation on the Adhesive & Sealant Industry'.



Dimitris Soutzoukis, Senior Regulatory Affairs Manager at FEICA, presented at the Afera Annual Conference 2021 in Valencia, Spain on 30 September 2021. The FEICA presentation, titled 'Adhesives and Sealants: Enablers of the EU GreenDeal', is available for FEICA Members via the FEICA Extranet. It touched on the ongoing opportunities and challenges of the European Green Deal and the Circular Economy Action Plan 2.0 (CEAP) and demonstrated how the adhesives and sealants industry contributes to sustainable development.

On 13 October 2021, FEICA Regulatory Affairs Manager, Paula Diaz, spoke at a Chemical Watch conference titled 'Key Regulatory Updates: Europe, Asia and the Americas'. Paula's presentation was on 'Regulating polymers: an update and downstream users' perspective'.



CALL for SPEAKERS

The World Adhesive & Sealant Conference (WAC 2022) will take place from 25 to 27 April 2022.

The event is still scheduled to take place in Chicago, USA. It is organised by The Adhesive & Sealant Council (ASC) and co-organised by FEICA and ARAC (the Asia Regional Adhesive Council). The event rotates between the three organisations every four years. Their 'call for speakers' is open.

You can view the topics of interest and submit an abstract via www.WAC2022.org



Dimitrios Soutzoukis, Senior Regulatory Affairs Manager at FEICA, will present 'How adhesives and sealants can contribute to the EU Green Deal goals' at the ASEFCA workshop on 16 November 2021.

Registration open until 12 November via www.congreso adhesivos.com/en/work

For more information on ASEFCA, see page 11



FEICA MEMBER PORTRAITS

Five fascinating facts!



In every issue of CONNECT, we introduce a member(s) of FEICA. Here, they share, in their own words, interesting insights into their company in 'five fascinating facts'.

In this issue, we present our Spanish National Association Member ASEFCA.

MEMBER PORTRAIT Content by Asefca



The adhesives and sealants industry, a continuous success story: the Spanish Glues and Adhesives Manufacturers Association (ASEFCA) was established in 1977 with the aim of promoting the development and progress of the glue, adhesive and sealant industries and strengthening the competitive capacity of Spanish companies. ASEFCA is a national, non-profit business association, open to all institutions related to the Adhesives and Sealants Sector as well as to suppliers of raw materials and machinery. Since 2001, the Footwear Technology Centre, INESCOP, has managed the ASEFCA Secretariat. It maintains close contact with this organisation to promote all issues related to the Adhesives Sector in its speciality in footwear and other applications, as well as to offer the services of the adhesives department to ASEFCA members.

Within ASEFCA is the Spanish Adhesion and Adhesives Group (GEAA), a forum that aims to bring together, promote and coordinate scientific and technical knowledge on adhesion and adhesives. The GEAA collaborates in the organisation of the International Congress on Adhesion and Adhesives, which is held every two years in Spain. It also organises courses on adhesion and adhesives focused on users from different industrial sectors.

Legislation: ASEFCA has a Technical Working Group that deals with aspects related to legislation in force or in preparation which horizontally affects the adhesives and sealants sector.

Standardisation: ASEFCA is a corporate member of UNE (the Spanish standardisation society) and holds the Secretariat of the Technical Committee for Adhesives Standardisation: CTN 143. Members of ASEFCA actively collaborate in the study and drafting of Standards, both Spanish and European, through the European Committee for Standardisation, CEN/TC 193, whose Secretariat is held by UNE.

Packaging: ASEFCA belongs to the Spanish Packaging Technology Platform, Packnet, which aims to provide a collaborative response from the packaging sector, to create a common space where knowledge can be exchanged and to bring together and promote R&D&I in the packaging sector.

Construction: ASEFCA is associated with the Spanish Confederation of Associations of Construction Product Manufacturers, CEPCO. The confederation is perceived as an entity supported by its business and associative fabric, which provides constructive dialogue together with its opinion to the Administration and which aims at a range of services both to its businesspersons and to all those who are related to the world of Construction.

Sustainability: Nowadays, when regulations on chemical products are constantly changing, and consumers and companies are increasingly concerned about adopting new, more sustainable technologies and moving towards a circular economy, the world of adhesives is going to have to change and adapt to get on board this train. That is why it is more important than ever for adhesives manufacturers to have a common meeting point with ASEFCA from which to address the new challenges that arise.

FEICA membership: ASEFCA is a member of FEICA (European Association of the Adhesives and Sealants Industry), together with other countries of the European Union. Through FEICA, it participates in the elaboration of European Directives related to issues affecting the Adhesives Sector, such as the transport of dangerous goods, labelling, environmental protection, and FEICA model environmental product declarations (model EPDs) for our industry, the European Congress of Adhesives and Sealants, World Congress of Adhesives, and European Adhesives and Sealants Industry.

20 YEARS OF ACTIVE ENGAGEMENT FOR A SUCCESSFUL CHEMICALS POLICY

DUCC celebrate 20 years of active engagement in EU chemicals policy

Created in 2001 following the publication of the European Commission's White Paper "Strategy for a Future Chemicals Policy", the Downstream Users of Chemicals Coordination group (DUCC) is a joint platform of 11 European associations, including FEICA, whose member companies use chemicals to formulate mixtures for consumers as well as for professional and industrial users.

Being at a strategic place in the chemicals value chain, DUCC has been focussing its work on the downstream users' needs, rights, duties and specificities under REACH and CLP, providing useful guidance material and expertise to key actors in the chemicals value chain, and has been highly appreciated by EU regulators, notably in the European Commission and in ECHA. Find out more through this leaflet (< click here) created on the occasion of DUCC's 20th anniversary and via www.ducc.eu.



www.ducc.eu

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FEICA CONNECT, FEICA's quarterly newsletter has a very targeted readership of key industry professionals comprising adhesive & sealants producers, distributors, suppliers and service providers.

CONNECT is sent to +5000 adhesives and sealants professionals and shared via FEICA's Social Media channels.

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