



The European voice of the
adhesive and sealant industry

The 6th Conference of Asia Regional Adhesive Council

“Market Influence from both the Circular Economy and Regulations in Europe”

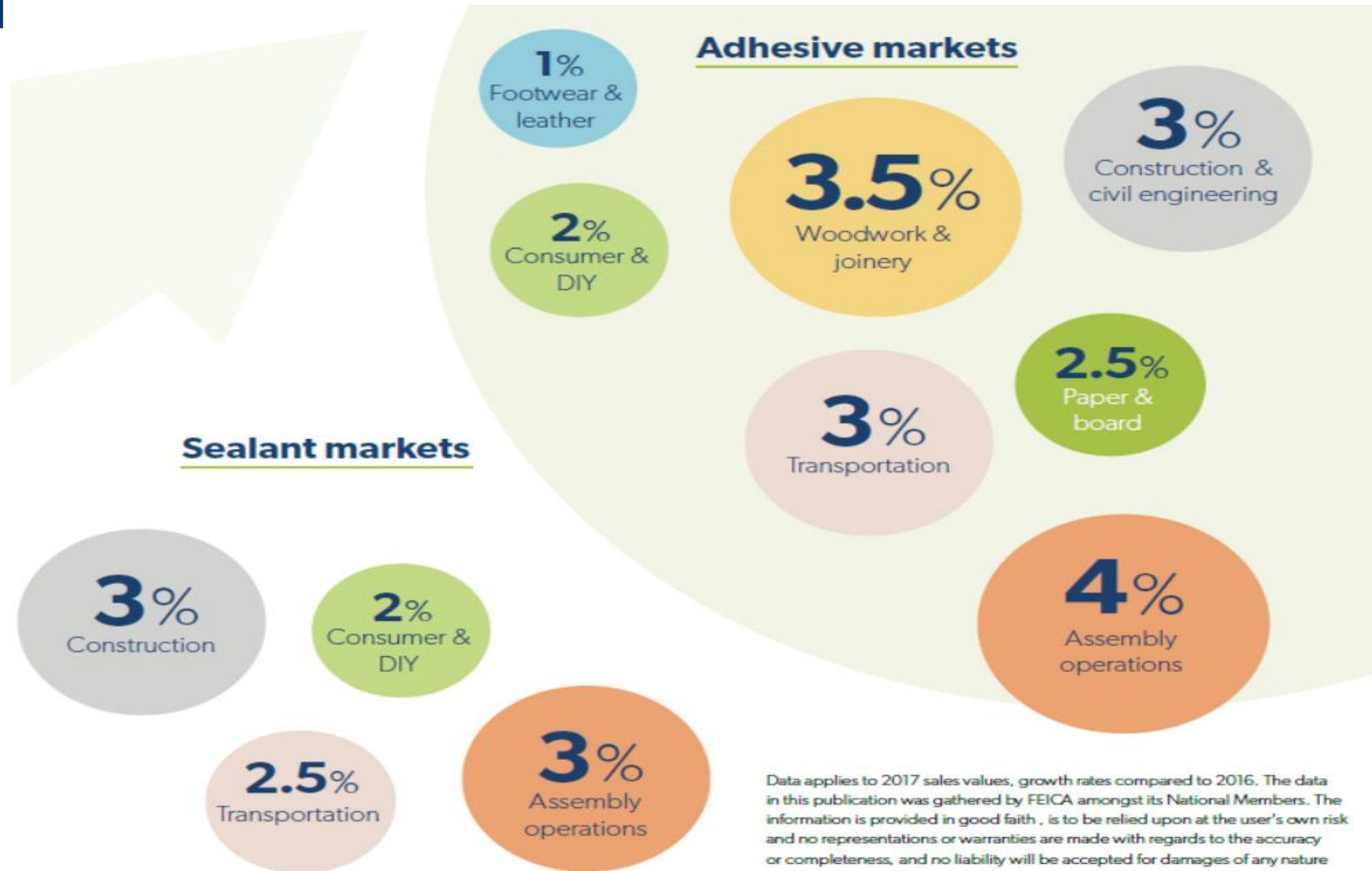


September 18, 2018

Philip Bruce, Secretary General

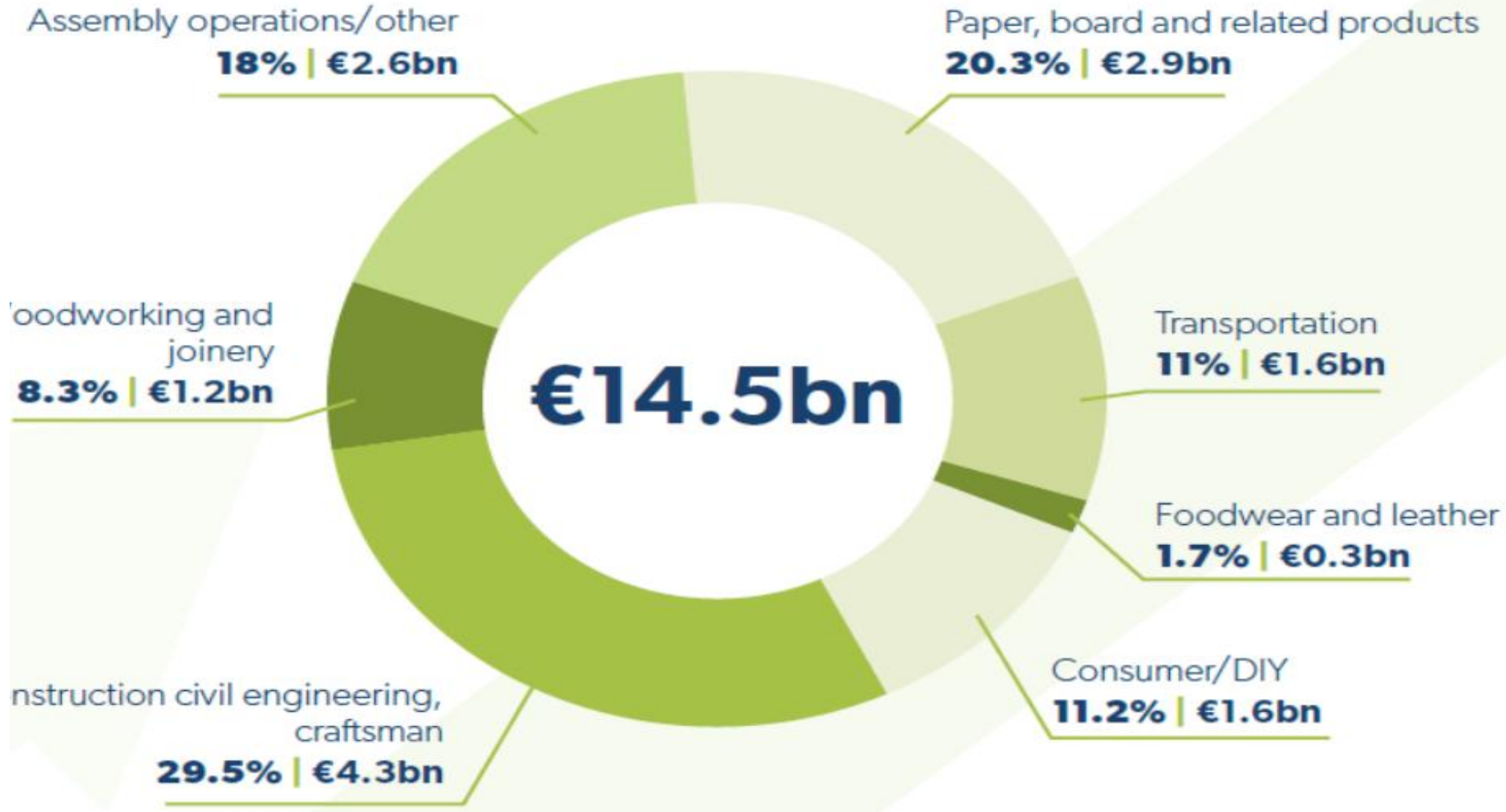


European growth rates in 2017 by end-user market

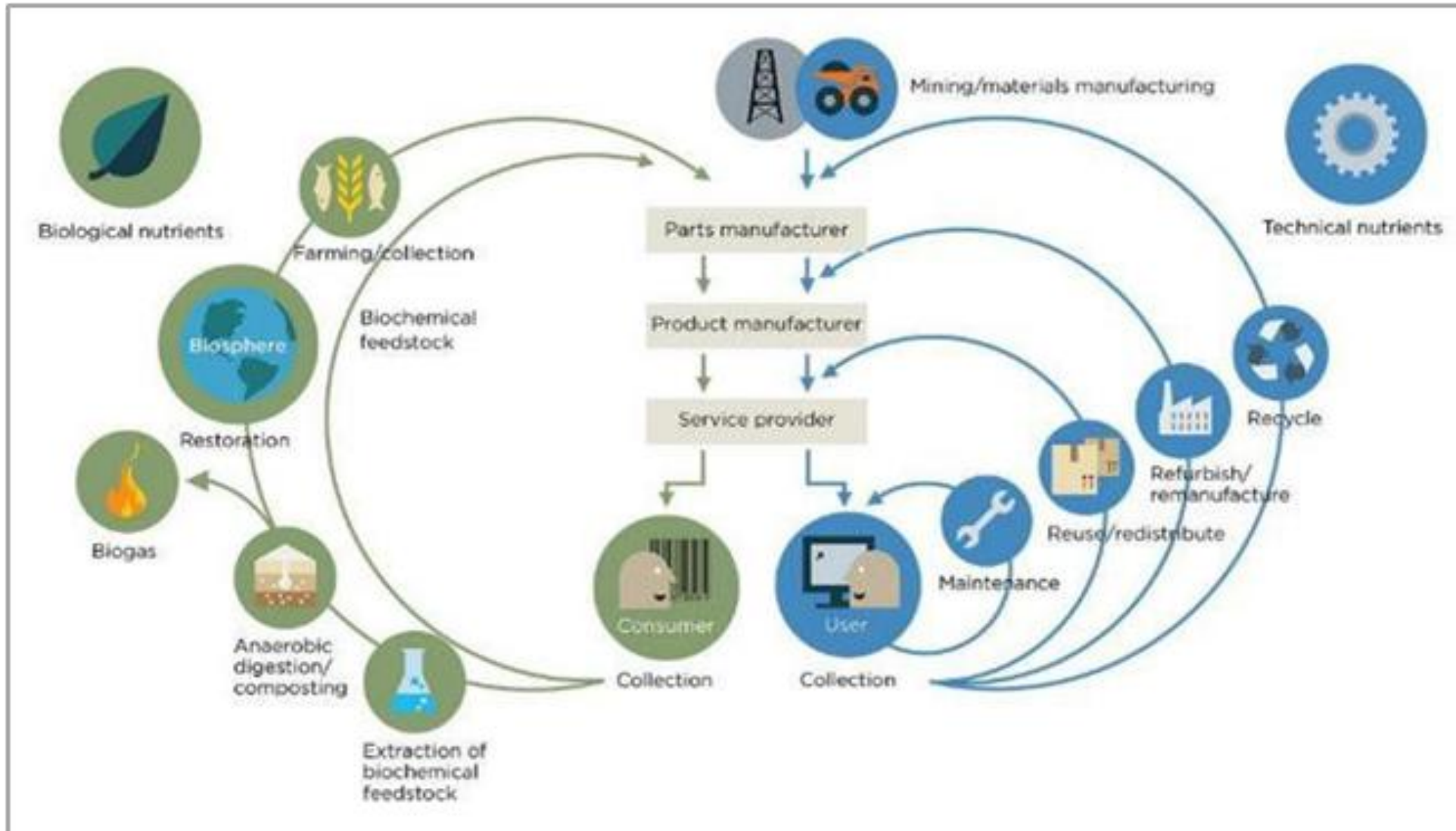


Data applies to 2017 sales values, growth rates compared to 2016. The data in this publication was gathered by FEICA amongst its National Members. The information is provided in good faith, is to be relied upon at the user's own risk and no representations or warranties are made with regards to the accuracy or completeness, and no liability will be accepted for damages of any nature whatsoever resulting from the use or reliance on this data.

The European 2017 adhesive & sealant market - by End-user sectors



The circular economy



the circular economy seeks “to be restorative and regenerative by design”

Moves away from the linear “take make and dispose” model

Circular economy will change some supply chains as we know it!!

EU Parliament Report on circular economy (CE)

- *Consider not only the product but the whole system required for its functioning in the Ecodesign process*
- *Stresses the importance of obliging manufacturers/sellers to take responsibility for the **entire lifecycle of a product, of boosting repairability, upgradability, modularity and recyclability***

Strong Political pressure from the Parliament and Commission to implement CE in Europe and also via UN into other regions!

A & S enhances Sustainability, Circularity and Waste reduction

Markets where adhesives affect recycle and repair will come under pressure affecting business!



FEICA Position Paper on circular economy was published at the Riga Conference!

FEICA position paper seeks to highlight the Adhesives and Sealants (A&S):

- Commitment to LCA/ Sustainable environmental improvements developed over decades – it is not just about recycling!
- Support for the principles on circular economy
- Commitment *for innovation to develop products to enhance ce on material and waste reduction in future*

In summary ce will be a game changer for some markets!



European Regulatory Challenges



EU Restriction for Polyurethanes

Acronyms

PU = Polyurethanes

MoU = Memorandum of Understanding;

- Legislation to restrict diisocyanates if monomers > 0.1%.
- Focus lies on harmonising criteria for exemptions and to be ready to review Commission draft due in Q3/4.
- MoU with stakeholder associations in the PU value chain to jointly develop training materials required for compliance with restrictions.

This is a major area of focus for FEICA to work with the authorities to defend exemptions and to seek to



REACH related legislation

Acronyms

REACH = European Chemicals Management Program;
EChA = European Chemicals Agency

REACH

Poison Centres

- **Last REACH registration deadline in May 2018!**
 - But REACH is far from over – it's a new beginning!
 - EChA has now a full data set and may step up substance evaluation potentially leading to restrictions and phase out.
 - Encourage supplier/registrants to use FEICA Use Maps.
-
- Preparation for Poison Centre notifications will be an **onerous task** for industry.
 - **FEICA Task Force involved with EChA in**
 - ✓ Feasibility study – crucial.
 - ✓ Clear guidance documents.
 - ✓ Product Categorisation.

Mineral Oil in Food packaging

Acronym

MOH = Mineral Oil
Hydrocarbons

BfR = German federal
agency for risk assessment



Mineral Oil in
Food
packaging

- FEICA testing of MOH migration from hotmelt adhesives into packaged food is moving ahead.
 - False positives:
 - ✓ EU Joint Research Center workshop on evaluation of existing test methods.
 - ✓ Meeting with German BfR in June on false positives on MOSH and MOAH (with IVK) was successful
- ➔ Building trust and educate authorities and supply chain;

Restrictions on impurities in silicones

Acronyms

SVHC = substance of very high concern;

D4, D5, D6 = impurities in silicones;

Annex XIV: list of substances requiring authorisation;

Cyclic
siloxanes as
SVHC on
Candidate list

- D4, D5, D6 were added to the REACH Candidate list despite of advocacy from silicone industry and downstream user associations.
- Silicone upstream continues to collect real-world monitoring data to establish that D4-D6 concentrations do not merit regulatory action...
- There are currently no restrictions for sealants and adhesives in the EU

Take away message:

There is currently no proposal to move cyclic siloxanes to Annex XIV but we are monitoring this closely.

In Summary

FEICA is seen by the Commission as THE consultation partner for our sector

FEICA's expert groups advocate for beneficial **common procedures across Europe** and help **minimise regulatory burden** at a fraction of the cost the individual member would have to spend.

Why **70%** of
FEICA resources is
supporting
regulatory
affairs

FEICA is instrumental in safeguarding business:

- Polyurethanes
- Food packaging
- Paper and wood
- Silicones
- Construction products
- Assembly and Electronics
- Consumer products, sealants (biocides, sensitizers)
- Affecting all business: recycling, REACH, CLP, ...

FEICA's focus
is on key
regulations,
affecting
survival of
€ 7 billion
adhesive &
sealant
turnover in
Europe