

The background of the slide is a photograph of a hand holding a crumpled green leaf against a clear blue sky with some light clouds. The leaf is held in a way that it looks like a small tree or a flower.

Proposal for a training on the safe use of the most harmful chemicals

An industry commitment

8 September 2022

Index

- FEICA Facts and Figures
- The impact of the extension of the GRA to professional uses of adhesives and sealants
- The importance of professional uses of adhesives and sealants
- Examples of professional uses of adhesives and sealants by sector
- FEICA proposal
- The diisocyanates example

FEICA Facts and Figures



MARKET

7 market segments



employs more than

45,000
people



14
technologies



470 million
euros

on Research and
Innovation
investment



17 billion
euros

contribution to the
EU economy



2%

of European chemical
industry's turnover



5 million
tonnes

of adhesives
and sealants



250,000

different products for
the most diverse
applications

COMMUNITY

800

adhesives and sealants
producers in Europe

165

adhesives and
sealants experts



ACTIVITIES

6 key
projects

- ▶ Circular economy
- ▶ Safe use of mixtures
- ▶ Good practice
- ▶ Food contact
- ▶ Innovation and education
- ▶ Model EPDs

85

publications
annually



COMMUNICATION

10,000

connections
on LinkedIn



5,000

followers
on Twitter
and Instagram



8

events
per year



bringing together

3,000

industry stakeholders

VISION

1 FEICA Vision

“ The adhesive and sealant industry is committed to enabling a growing population to live a better life and to use the planet's resources responsibly and efficiently. ”

FEICA's mission is to support the industry in this objective by focussing on **sustainable development, health & safety and innovation.**



16 National Associations representing 17 Countries 450+ members



25 Direct Company Members



23 Affiliate Company Members





FEICA Facts and Figures

Adhesive and sealant producers in Europe

There are about 800 adhesive and sealant companies in Europe manufacturing at some 700 sites. They can be classified as follows:

- **Tier 1 companies:** The top 10, with annual sales above 200 million euros.
- **Tier 2 companies:** About 50 manufacturers with annual sales in the range 20 - 200 million euros.
- **Tier 3 companies:** 740 SMEs with annual sales in the range 2 - 20 million euros.

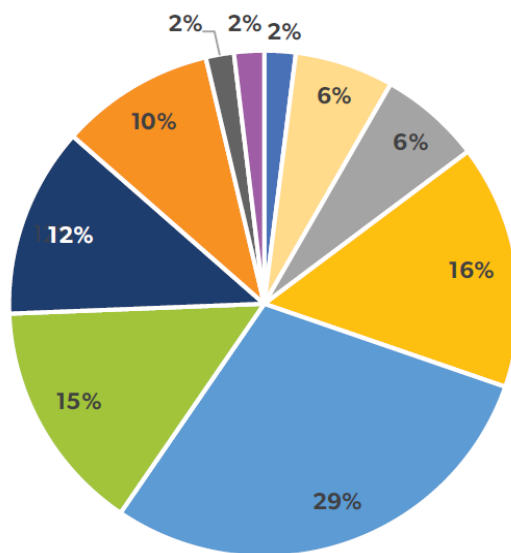
There are approximately 740 SMES in Europe manufacturing adhesives and sealants

The European adhesives and sealants market

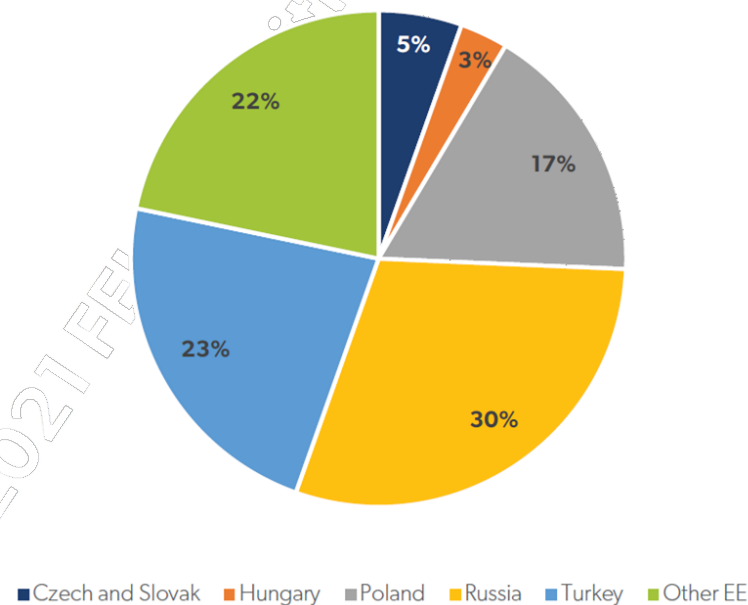
2020 Europe Adhesives & Sealants Market
4.7 million tonnes
€15.5 billion

Forecast to grow to
€22.2 billion
by 2026

2020 Western Europe adhesives and sealants volume demand share by country (%)



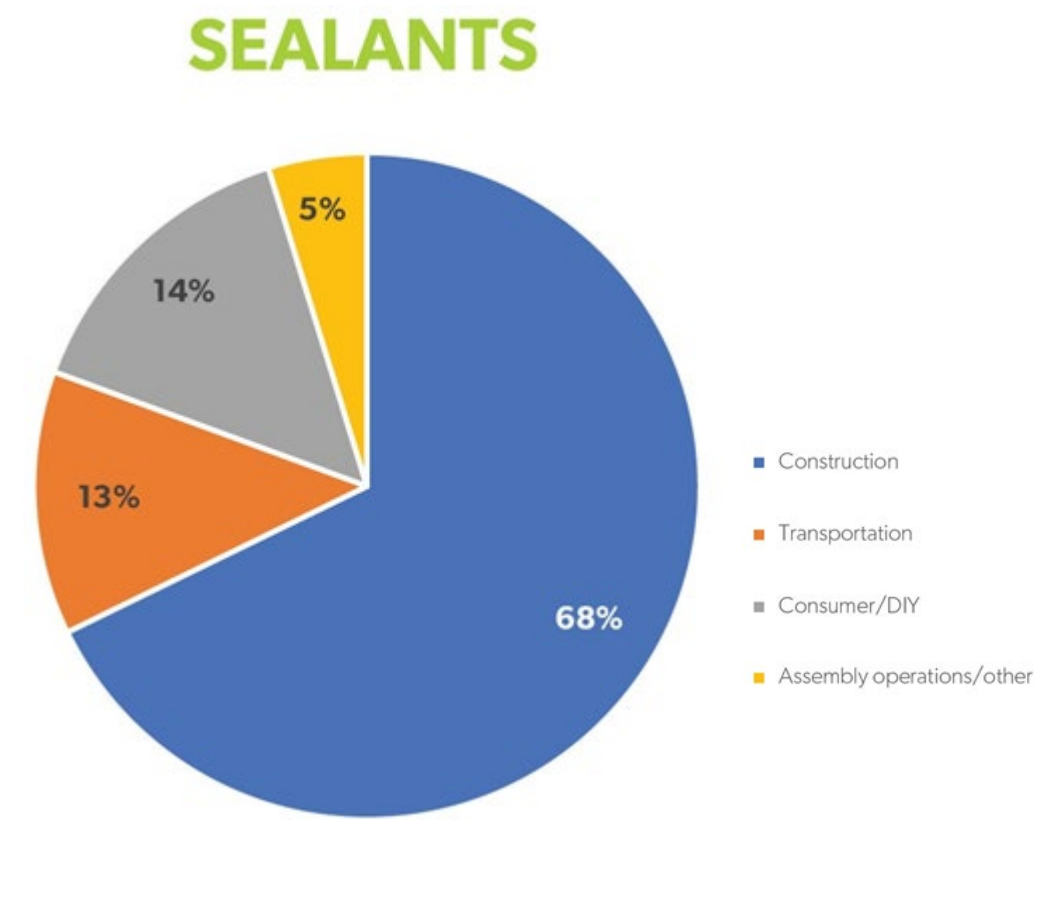
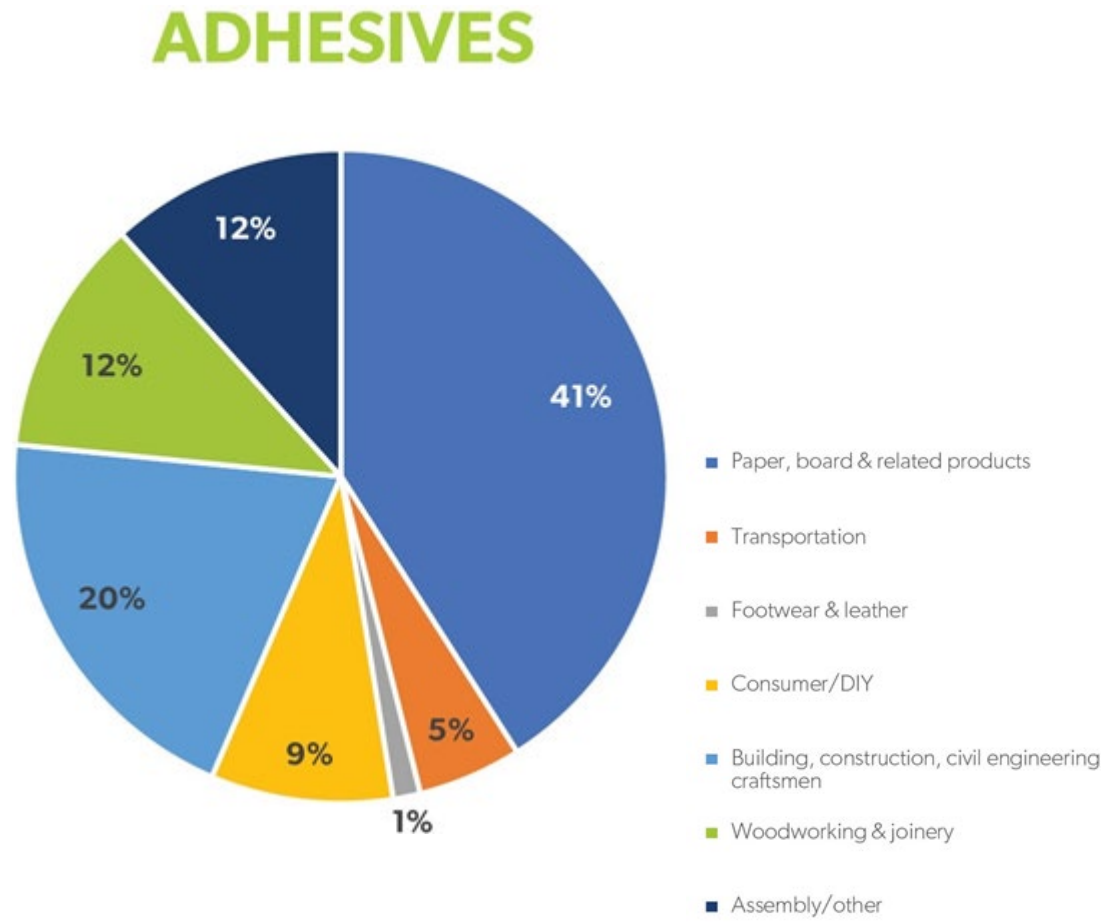
2020 Central & Eastern Europe adhesives and sealants demand share by country (%)





2020 European adhesives and sealants demand by market segment

SOURCE : EUROPEAN ADHESIVES AND SEALANTS MARKET – 2021-2026 Copyright © 2021 FEICA/Smithers



The impact of the
extension of the GRA to
professional uses of
adhesives and sealants





Potential impacts

According to Ricardo's study '[Economic Analysis of the Impacts of the Chemicals Strategy for Sustainability - Phase 1 Report](#)' for the European Chemicals Industry Council (Cefic):

- **Risk of hundreds of substances banned at once**, likely much more (grouping substances in families)
- The **adhesives and sealants sector would be within the ten subsectors most impacted**
- The adhesives and sealants sector would be the **third most impacted subsector when it comes to number of products affected**.



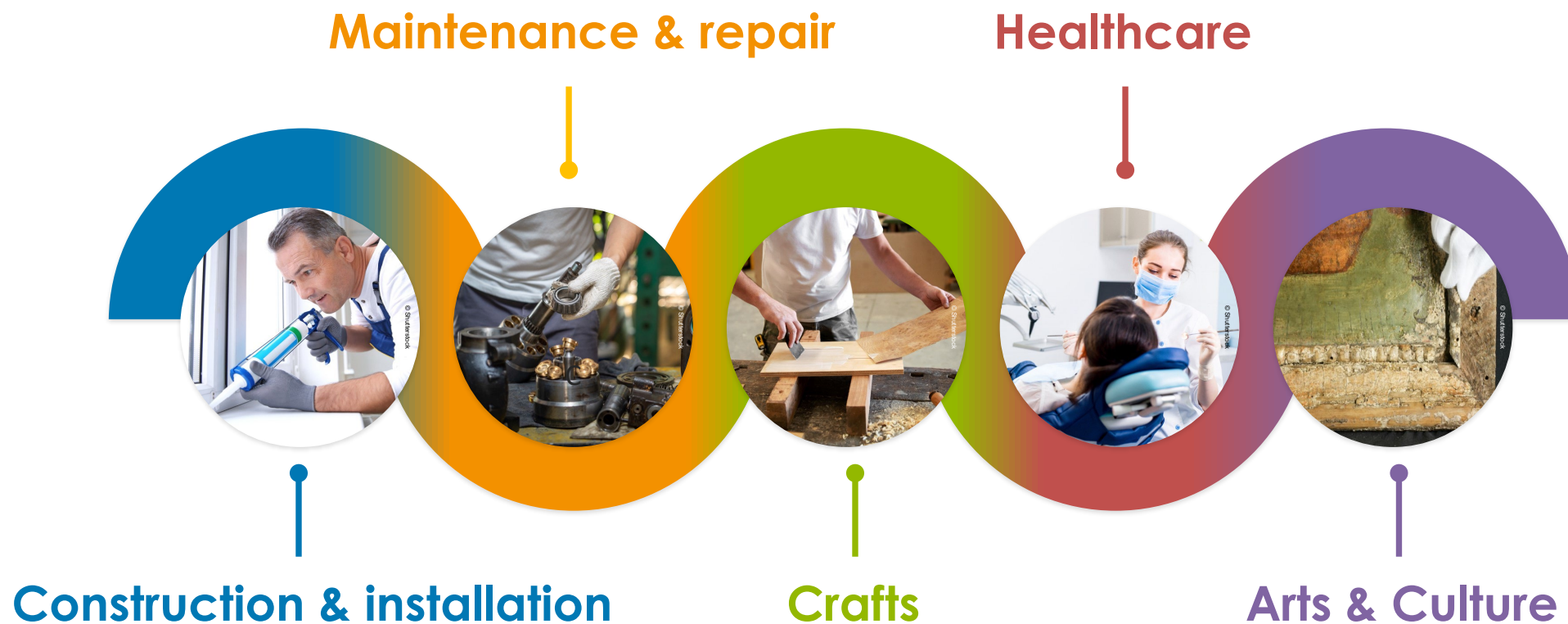
Potential impacts

- There is a risk that adhesives and sealants - without any significant risk in practice - will be **banned without risk assessment**
- The range of potentially affected uses is increasing enormously
- Extension to additional hazard classes creates uncertainty
- Workers in construction sector or repair shops will only have access to products that are also offered to private end consumers in the DIY market – therefore functionality will be lowered

The importance of professional uses of adhesives and sealants



Where can professional A&S users be found?



Professional users provide tremendous value

Innovation

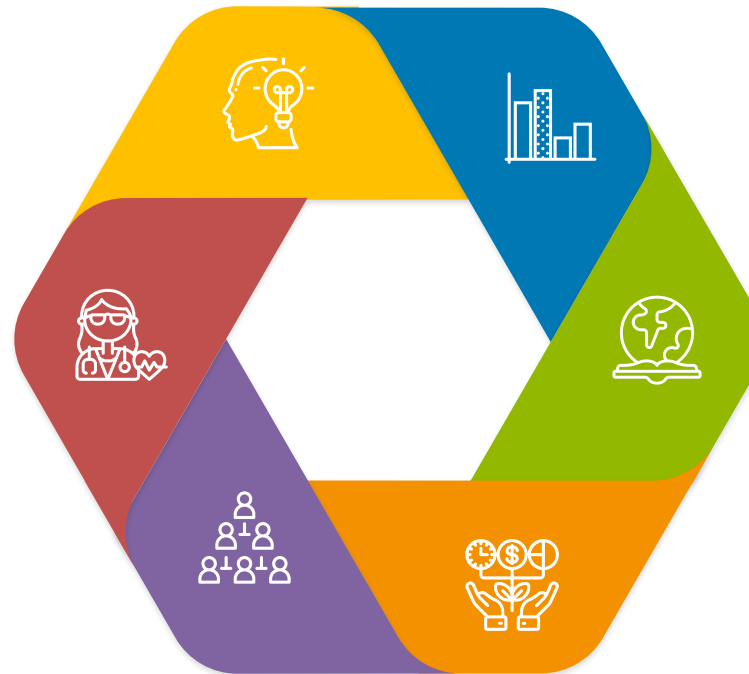
Professionals are exploring and innovating new products and processes

Health & well-being

Providing state-of-the-art medical and healthcare treatment

Social impact

Saving money for consumers by repair;
Preserving products and heritage



Employment & SMEs

Substantial number of jobs in construction, maintenance, repair, medical and crafts

Sustainability

Facilitating maintenance, reuse and repair instead of disposal

Resilience

Maintenance, reuse and repair keep products functioning and reduce primary material demand and imports

Professionals need high performance chemistry

Dependability

Professional A&S uses affect safety-relevant components; performance must be ensured even in imperfect use conditions

Reliability / Durability

Professional applications need to reliably withstand substantial use phase stresses and resist ageing over years or decades.



Bond/seal strength

Bonding strength/sealing needs of professionals are comparable with industrial requirements; repair aims to restore original performance

Speed

Maintenance and repair need speed to minimise asset downtime and prevent damages; Medical uses are incompatible with long A&S setting times

Professionals rely on knowledge and training

- Professionals perform demanding tasks in complex environments, which may contain mechanical, electrical and chemical hazards
- The quality of professional work has direct impact on the safety of buildings, equipment and vehicles
- **To successfully, reliably and safely perform their work, professionals already rely on continuous training**
- **Training on the safe use of A&S can be integrated into training plans for professionals***



* such as the training offers for the safe use of isocyanate containing polyurethane products under REACH

Professional users contribute to EU strategies



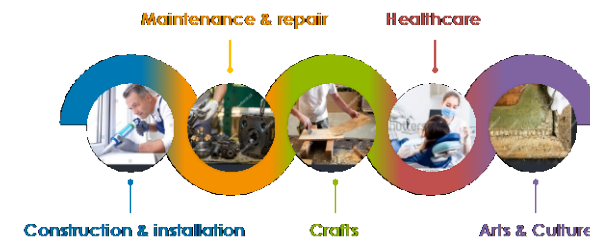
EU strategies, initiatives and regulation (excerpt)

CEAP 2.0	Sustainable Products init.
Waste targets	Circular Electronics init.
Right-to-repair	Strat. for Sustainable Textiles
SME strategy	Empowering Consumers
EU Renovation Wave	Strategy for Sust. Built Env.
EU Climate law	Climate Adaptation strategy
Solar Energy strategy	Energy Perform. of Buildings
RepowerEU	Affordable Housing Initiative

A hand is shown from the bottom, holding a crumpled green paper ball. The background is a clear blue sky with some light clouds. The text is overlaid on the left side of the image.

Examples of professional uses of adhesives and sealants by sector

Construction sector



Installation

Professionals are key for the correct installation of industrial products

Climate & energy



Maintenance

Preventative maintenance to extend building lifetime

Circular economy

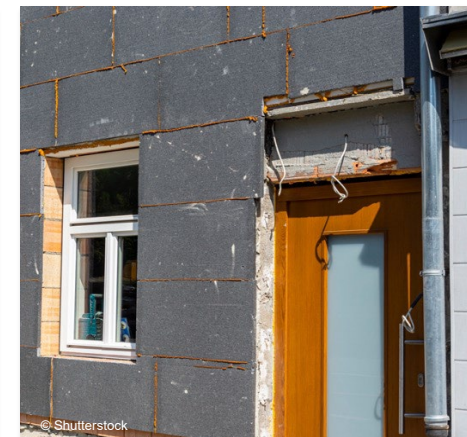


Repair

Preventative and emergency repair, preventing follow-on damage

Circular economy

Strengthen the EU's resilience



Renovation

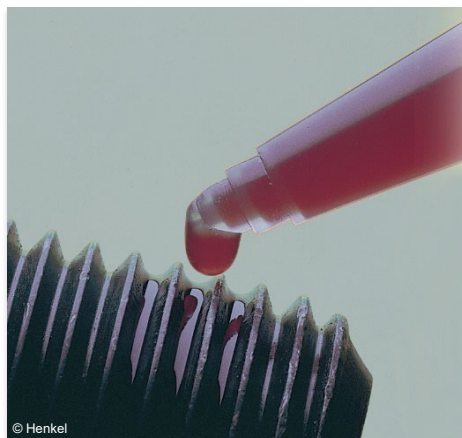
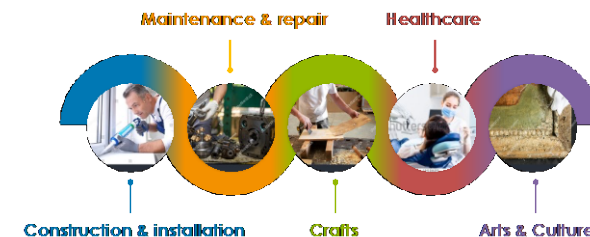
Energy renovation and quality-of-life improvements

Climate & energy

Circular economy

Strengthen the EU's resilience

Machinery, equipment, industry



Installation

Sealing, gasketing, thread locking during installation of machinery / equipment

Strengthen the EU's resilience

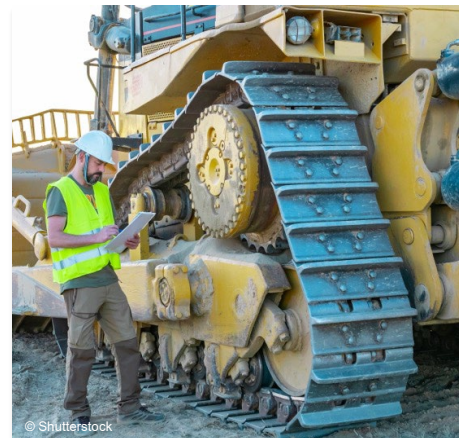


Installation

Upgrading/ converting industry installations to renewable energy, hydrogen

Climate & energy

Strengthen the EU's resilience

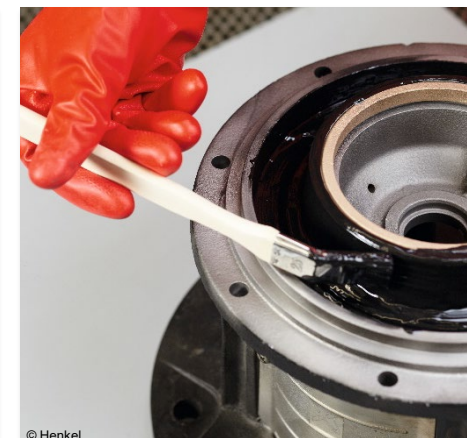


Maintenance

Maintenance and repair of heavy machinery and vehicles

Circular economy

Strengthen the EU's resilience



Maintenance

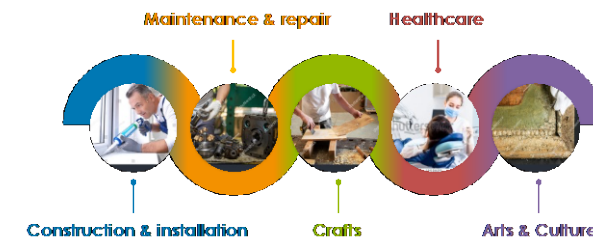
Improving efficiency of pumps, stopping leaks

Climate & energy

Circular economy

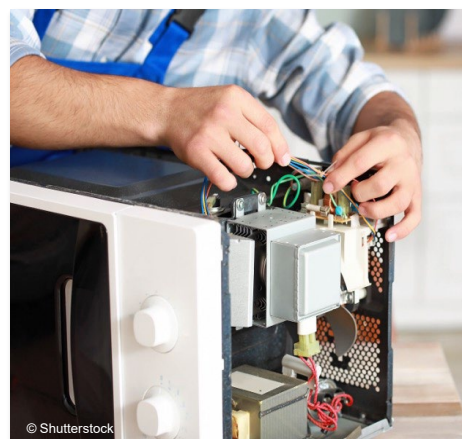
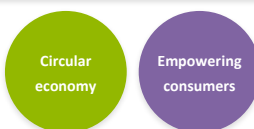
Strengthen the EU's resilience

Electrical appliances and electronics



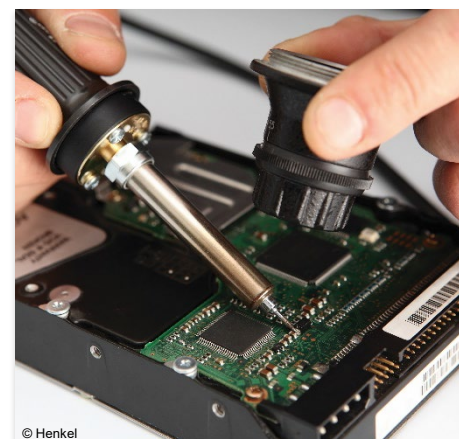
Maintenance

Maintenance and repair of power tools and household tools



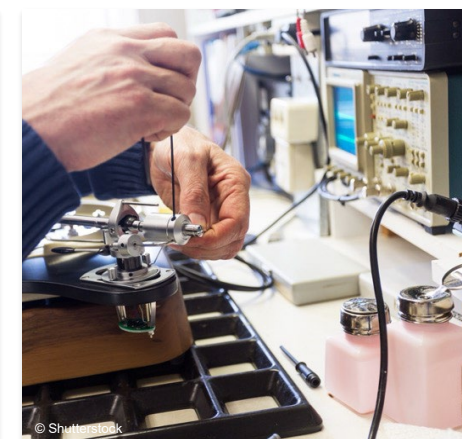
Appliance repair

Servicing and repair of household appliances



Electronics repair

Electronics repair, circuit board remanufacturing



HiFi repair

Maintenance and repair of mechanical and electronic parts



Transportation & automotive



Maintenance

Servicing and sealing of drivetrains, gears and engines

Circular economy



Windshield repair

Filling of small damages in installed wind screens

Circular economy



Windshield repair

Replacement of broken wind screens and rear windows

Circular economy



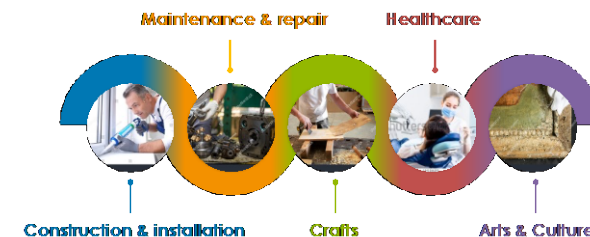
Upholstery repair

Seat repair, including leather repair

Circular economy

The majority of adhesive and sealant uses apply to electric vehicles as much as to combustion engine vehicles. The importance of adhesives and sealants will remain in the age of electric mobility.

Agriculture and food production



Maintenance

Maintenance of farm equipment and vehicles

Circular economy

Strengthen the EU's resilience



Repair

Repair of equipment such as conveyor belts

Circular economy

Strengthen the EU's resilience

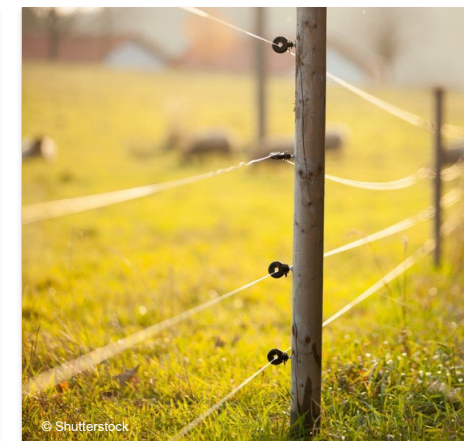


Vehicle repair

Tyre repair and retreading

Circular economy

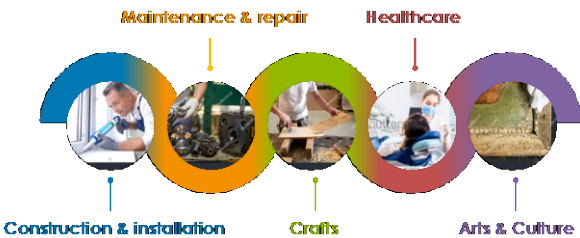
Strengthen the EU's resilience



Installation

Installation and repair of fencing

Furniture



Woodworking

Small scale and to-measure crafting of furniture



Craft furniture

Creation of one-of-kind pieces of furniture



Upholstery

Production, repair and replacement of upholstery on furniture



Repair

Repair of industrially made and crafted furniture products



Textiles, fashion and sports



Cobblery

Manufacture, repair and resoling of dress shoes; Repair of sports shoes

Circular economy

Empowering consumers

Micro and small enterprises



Leatherworking

Manufacture and repair of leather garments, bags and accessories

Circular economy

Empowering consumers

Micro and small enterprises



Textile repair

Repair of waterproof clothing, tents

Circular economy

Empowering consumers



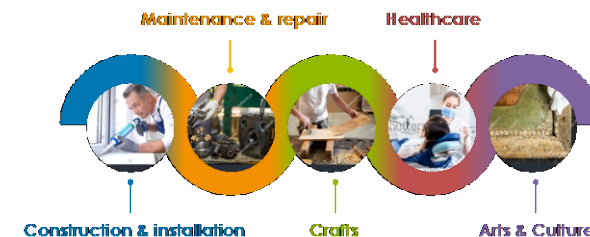
Marine repair

Repair of boats, surfing and diving equipment

Circular economy

Empowering consumers

Crafts, culture and art



Crafts

Creation of custom, hand-made decoration and small furniture

Micro and small enterprises



Artisanal crafts

Artisanal crafts, such as making of musical instruments

Micro and small enterprises



Heritage crafts

Traditional crafts tied to local heritage or tradition

Micro and small enterprises



Preservation

Restoration and preservation of art and heritage objects

Healthcare



Dentistry

Installation of dental braces



Dentistry

Bonding of tooth replacements



Surgery

Wound closure with adhesives to reduce scarring



Hearing aids

Creation of ear molds for hearing aids and hearing protection

FEICA proposal



FEICA proposal

- FEICA members would like to collaborate with the European Commission to ensure the highest level of protection for professionals
- FEICA members would like to propose the development of safety training covering the risks arising from the most harmful chemicals

FEICA proposal

- Industry to provide training materials for the safe use of the most harmful chemicals
 - Via OSH requirements at each MS; or
 - Via a restriction requiring training requirements, such as the diisocyanates restriction

Training materials would provide instructions for the safe use of the most harmful chemicals (as defined in CSS) by professional uses – available in all EU languages

FEICA proposal

Independent of an horizontal restriction establishing training requirements, an RMOA could be done to identify additional risk management measures such as restrictions (68.1), authorisations, BOELs, OHS measures, etc.



Training scope

- Training requirements to ensure the safe use of the products by professionals
- Training structure still to be discussed:
 - A basic training for all professionals – how to avoid exposure
 - Training divided into modules, e.g.
 - Per sector
 - Per application
 - Per hazard type



Trained professionals

According to FEICA internal estimations, about 2/3 of professional users received training on the safe use of chemicals

- Professionals who can prove they are sufficiently trained should not be subject to additional requirements
 - level of training needs to be defined in legal text

Implementation: an online platform

Providing easily accessible training via an online platform:

- Makes the materials easily available to professionals
- Ensures harmonisation at the EU level
- Helps improving education of those professional users not currently well trained, e.g. self-employed
- Is tailored to the user – easy to select applicable training

The diisocyanates example





Practical example: diisocyanates restriction

The **REACH restriction on diisocyanates** was published in the Official Journal of the European Union on 4 August 2020.

- Addressed to industrial and professional uses
- The restriction established that in order to use diisocyanates in a concentration over 0.1% by weight as substances on their own, as constituents in other substances or in mixtures for industrial and professional use(s) certain training and labelling requirements will have to be complied with.
- Targeted at avoiding the unsafe handling of diisocyanates, not at restricting product availability
- Polyurethane adhesives and sealants have not been banned and remain widely available

[Link to legal text](#)

A joint industry effort

- **Industry** along the entire supply chain worked closely together to **develop the required sets of training materials** and a **platform** for all users to access
- The **Polyurethane Exchange Panel** provided information to authorities, permitting REACH regulators to have a **pragmatic and harmonised approach**, which can be applicable to **all companies, including SMEs**
- FEICA developed **tailor-made** training material for **adhesive and sealant users**

EU

ALIPA (aliphatic isocyanates)
APPLIA (home appliances)
CEC (footwear)
CEPE (coatings and paints)
COTANCE (euroleather)
EFCC (construction chemicals)
EFIC (furniture industry)
EPF (panel federation)
EPDLA (polymer dispersion & latex)
ETRMA (rubber)
EUIA (printing inks)
EURATEX (apparel and textile)
EUROMOULDERS (moulded PU parts)
EUROPUR (flex PU foam blocks)
FECC (chemical distributors)
FEICA (adhesives and sealants)
FERFA (resin flooring)
ICOMIA (marine industry)
ISOPA (arom. diisocyanates & polyols)
PPA EUROPE (panels and profiles)
PU EUROPE (polyurethane insulation)
RTP RESIN (resins)
PDA EUROPE (polyurea)

DE/BE

DEUTSCHE BAUCHEMIE
FEDUSTRIA
FSK
IVK - INDUSTRIEVERBAND KLEBSTOFFE
VDL (coatings)
ZVEI (electric and electronics)

A joint industry effort

- In **all official languages** of the Member States
- Industry consortium has developed a **training platform**, providing the **training material**
- A **certificate** demonstrates successful completion of the training after multiple choice questions have been answered correctly

A proof of successful industry collaboration

Dedicated training for adhesives and sealants

Module for **professional users** (non-industrial)

- Estimated more than a million professional users
- Typically using a polyurethane sealant or a one-component foam
- One basic training module covers all training requirements for professional adhesives and sealants users



Orientation
Wizard

SELECT YOUR WORKING ENVIRONMENT

Use in professional settings

PRECISE YOUR WORKING TASK

- Construction sector
- Flooring adhesives and coatings
- Other professional uses

DETAIL YOUR WORKING TASK

- Adhesives, Sealants and Foams directly applied out of small packaging at ambient temperature
- ...
- High injection resins

Examples of dedicated training

Adhesives and Sealants 



Coatings 



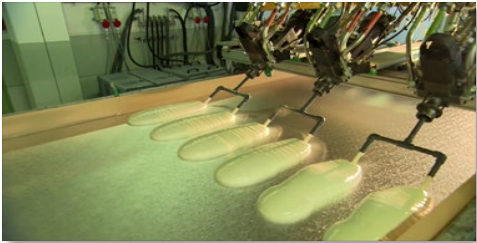
Elastomers and Fibers 



Basic Training 



Rigid Insulation Foams 



(Semi-) flexible Foams 



Wood and Foundry 



Others 





THANK YOU

Other interests or questions?

info@feica.eu