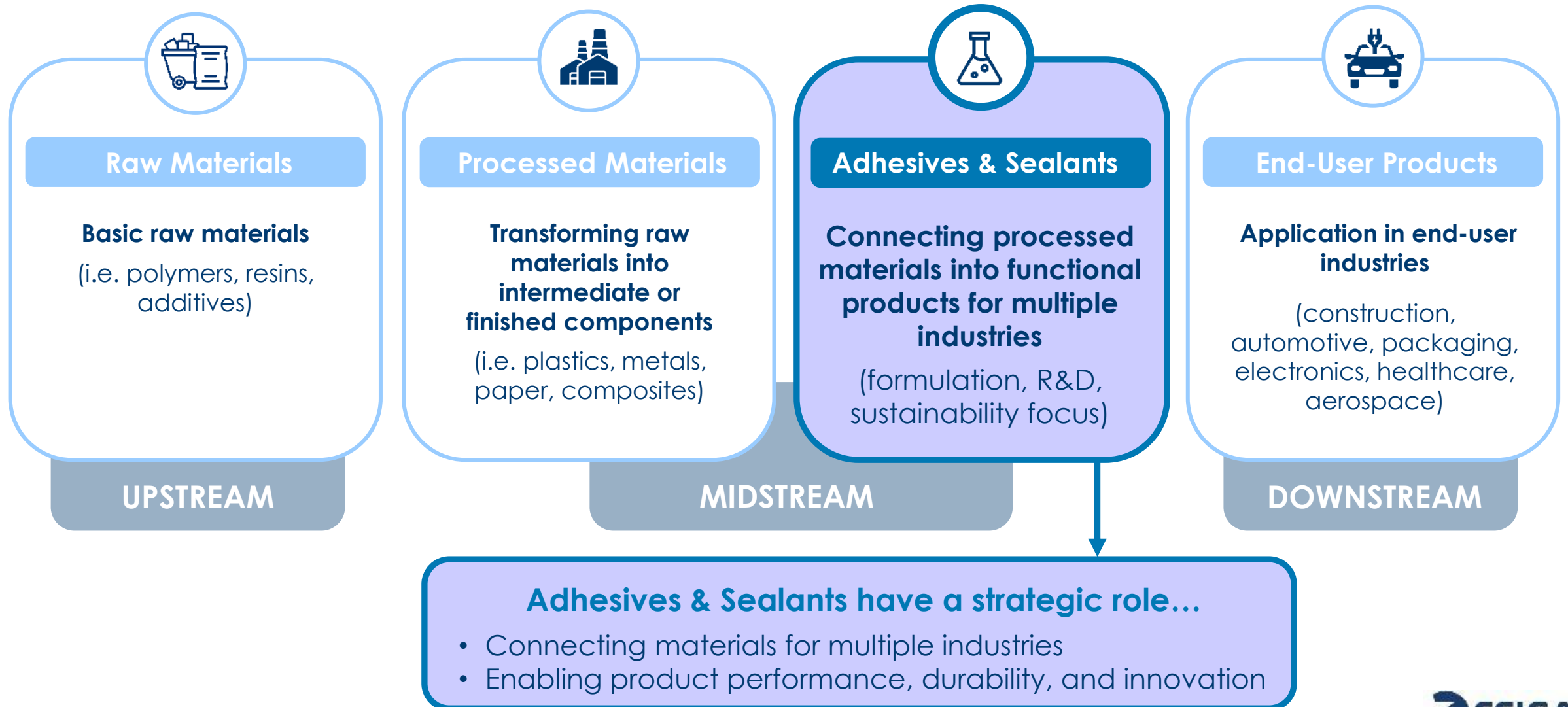


The Strategic Role of Adhesives and Sealants for Europe's "Triple Win Transformation"

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Adhesive & Sealant Industry: Downstream User of Chemicals but Midstream Enabler in Supply Chains



Adhesives and Sealants Contributions to EU Strategic Sectors

Energy

Digital Technologies

Healthcare

Transportation

Defence



Construction & installation

Industrial applications

Furniture

Art, crafts & culture

Agriculture & food production

Textiles, fashion & sports

Adhesives & Sealants:



A strong European adhesive & sealant industry is vital for clean energy systems and climate resilience

Enabling ENERGY Innovation & Sustainability



Strategic Context

EU Clean Industrial Deal and energy transition drive demand for renewables and low-carbon technologies



Critical Role of Adhesives & Sealants

Bonding/sealing in solar panels, wind turbines, batteries, and energy-efficient systems

Enable durability, thermal management, and lightweight design



Why a Strong European Industry Matters

Supports EU energy independence and innovation

Ensures secure supply chains and specialised R&D



Innovation Examples

Solar: adhesives for long-term panel performance

Wind: sealants for blade integrity and weather resistance

Batteries: thermal and structural bonding for safety and efficiency

Adhesives and Sealants: The Invisible Technology enabling the “Triple Win Transformation”



Adhesives and Sealants contribute to Circular Economy

“R-Strategies”: Challenges and opportunities

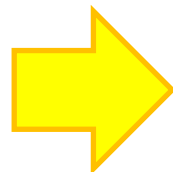
How can Adhesives and Sealants contribute to smarter designs to save resources and enable circularity?



Adhesives and Sealants Enhance durability
Contribute to longevity
Enable repair



How do Adhesives and Sealants perform in recycling and „end of waste“?



Goal	Strategy	Description
Smart product use and manufacture	R0 - Refuse	Make product redundant by abandoning its function or offering same function with radically different product.
	R1 - Rethink	Make product use more intense (e.g. product-sharing, multi-functional product).
	R2 - Reduce	Increase efficiency in product manufacture or use by consuming fewer natural resources and materials.
Extend lifespan of product and its part	R3 - Reuse	Reuse of functional discarded product by another consumer.
	R4 - Repair	Repair and maintenance of defective product to restore its original function.
	R5 - Refurbish	Restore and old product to bring it up to date.
	R6 - Remanufacture	Use product or parts in a new product with its original function.
	R7 - Repurpose	Use product or parts in a new product with a different function.
Useful application of materials	R8 - Recycle	Process the materials to obtain the same (high grade) or lower (low grade) quality.
	R9 - Recover	Incinerate materials to recover energy.

Adhesives and Sealants: Innovation to enable Circular Economy and foster repair and recycling

We as Sika are actively addressing the impact of Adhesives & Sealants with the recycling industry:

- Today's state-of-the-art **recycling processes for End-of-Life-Vehicles and Electric&Electronic Waste deal very well with adhesive bonded plastics parts** to produce high quality secondary raw materials
- Sika and ELV recyclers jointly explore to minimize cross-contamination in metal recycling
- The Adhesives and Sealant industry is investing in R&D to further establish „Debonding on Demand“ technologies for easier repair and reuse of products
- Cooperation along the entire value chain and life-cycle of products is key to enable a true Circular Economy

Technology neutral wording in EU regulations is crucial to allow innovation and unleash entrepreneurial spirit!



Regulatory framework around Adhesives & Sealants

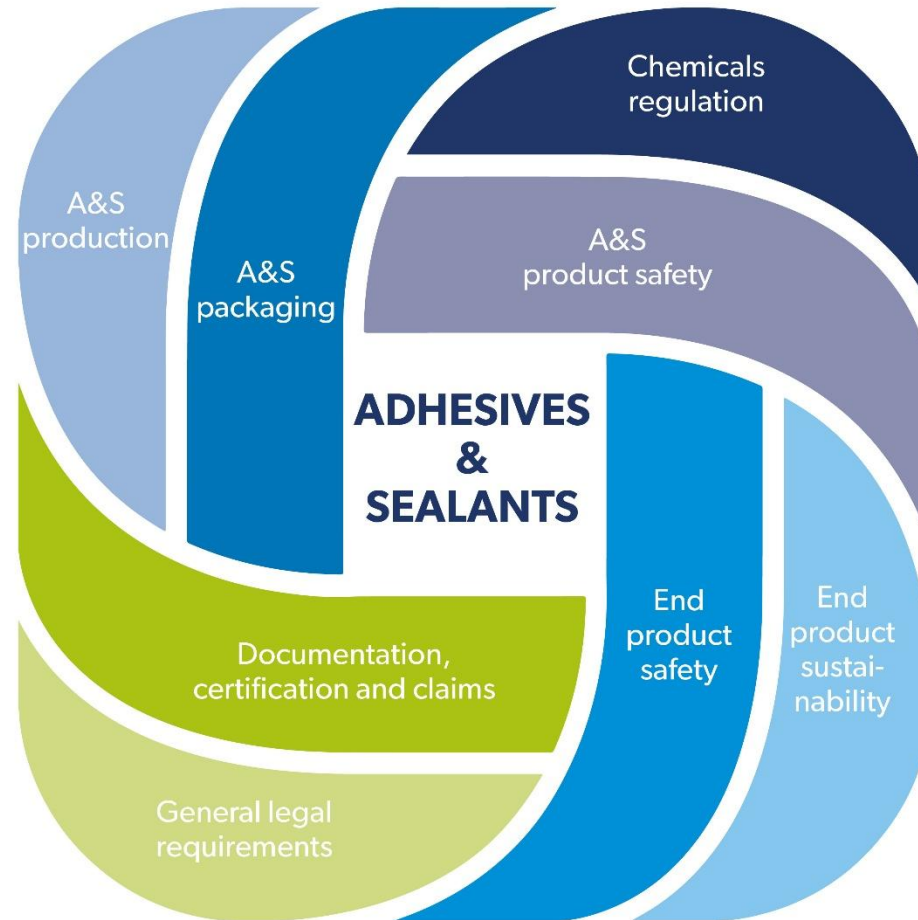
We welcome the EU's Simplification Agenda

- Packaging & Packaging Waste Regulation (PPWR)
- Waste framework directive (WFD)
- Road transport of dangerous goods (ADR)

- Industrial emissions directive (IED)
- Preventing plastic pellet loss regulation (PPLR)*
- Food contact GMP regulation
- Occupational safety and health (OSH)
- Pressure vessels directive; ATEX directive; PPE regulation; Machinery safety regulation

- Classification, labelling and packaging of chemicals (CLP)
- Digital product passports (ESPR, ELVR, ...)
- Product environmental footprint (PEF)*
- Environmental product declarations (EPDs)
- EU Ecolabels / Green public procurement (GPP)
- Substantiating green claims directive (SGCD)*

- Corporate sustainability reporting directive (CSRD)
- Corporate sustainability due diligence directive (CSDDD)
- EU Emissions trading system (ETS)
- EU Taxonomy
- EU Climate law
- Carbon border adjustment mechanism (CBAM)



- Current REACH framework
- Persistent organic pollutants (POP)
- Ozone regulation

- REACH (Isocyanates restriction)
- Occupational safety and health (OSH)
- Biocides regulation

- General product safety regulation (GPSR)
- Food contact framework regulation
- Food contact plastics regulation
- Drinking water directive
- Medical product safety
- Toy Safety Regulation (TSR)
- Cosmetics Products Regulation
- Recycled plastics in food contact regulation
- Restriction of hazardous substances in EEE (RoHS)
- Active & intelligent packaging regulation

- Packaging & Packaging Waste Regulation (PPWR)
- Single-use plastic directive (SUPD)
- Construction products regulation (CPR)
- End-of-life vehicles regulation (ELVR)*
- Waste framework directive (WFD)

* still under development

REACH works and is delivering a high level of protection. It provides a predictable and stable framework

REACH is the world's most comprehensive chemical legislation and regulative “gold standard” for more than 20 years

- Challenges lie in implementation and enforcement on imports
- Reopening the legal text in a full revision of REACH via OLP would increase regulatory uncertainty and likely result in more complexity for an already challenged industry
- Simplification is a guiding political principle of this mandate.
 - REACH can be simplified and modernized without opening the legal text following OLP with lengthy negotiations
 - Amendments, updates and improvements can be made by working on the annexes in a timely manner to give legal certainty



REACH can be further improved via secondary legislation and comitology