smart® bonds

for a Sustainable and Strong Europe

THE BONDS BEHIND EUROPE'S COMPETITIVENESS

Adhesives and sealants at the heart of Europe's industrial strength and strategic resilience

Smart Bonds, a FEICA initiative

About Smart Bonds

Smart Bonds is an initiative by FEICA to highlight the essential but often overlooked role of adhesives and sealants in Europe's economy and sustainability transition.

Across sectors such as construction, mobility, energy and packaging, adhesives and sealants enable lighter, more durable and more resource-efficient products. They are a key enabler of circular solutions, supporting repair, reuse and high-quality recycling, and contribute to the competitiveness of Europe's downstream industries.

Through Smart Bonds, FEICA aims to build understanding of how the adhesive and sealant industry contributes to the EU's strategic priorities, including circularity, innovation, and industrial resilience. The initiative brings together data, examples and insights to inform policymakers and stakeholders about the sector's role across critical value chains.

www.smartbonds.org

About FEICA

FEICA is the Association of the European Adhesive and Sealant Industry. It represents the sector at European level, supporting a competitive, innovative and sustainable industry that enables many of the EU's strategic value chains. FEICA provides regulatory guidance, helps companies navigate compliance requirements, and contributes industry expertise to EU policy and regulatory discussions, in close cooperation with its members and national associations.

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FEICA© Publication ref.: RAM-EX-P05-014

The Adhesive and sealant industry in the EU

A highly skilled workforce of over
50,000 people

20.7 billion €

With a €20.7 billion contribution, the specialised know-how of the A&S industry enhances the EU's manufacturing capabilities

85% of adhesives and sealants companies are **SMEs**

430 adhesives and sealants companies

650 manufacturing sites

580 million euros
invested in Research and Development, advancing high-tech solutions with leading innovative sectors

5-6%
spend of sales turnover on R&D for technologically advanced products

250,000
Adhesives and sealants are essential for 250,000 products that shape everyday life

4.7 million tonnes
volume demand of adhesives and sealants

Advanced Materials

Adhesives and sealants are designed for durable, application-specific performance that drives innovation across key industries

accelerates the transition to the
Circular Economy
across key consumer, professional and industrial markets

drives
Innovation
in crucial sectors, contributing to the strategic autonomy of the EU

Healthcare

Transport

Defence

Digital Technologies

Energy

Source market information: FEICA/Smithers Market Report 'European Adhesives and Sealants Market 2025-2030 - Facts & Figures 2025

SME Testimonial →

Tailored innovation on the shores of Lake Maggiore

Small and medium-sized enterprises make up 85% of Europe's adhesives and sealants sector, 365 companies that form its entrepreneurial backbone. They develop highly specialised bonding solutions in close collaboration with customers, e.g. in the automotive, footwear, construction and electronics sectors. Custom formulations, short development cycles, rapid technical support: these are the key competitive strengths in this part of the industry.

For companies at this scale, the European regulatory framework is a true enabler. Science-based rules, applied uniformly across the Single Market, enable customer trust, market access and long-term investment planning. However, when member states add requirements on top of EU legislation, or when overlapping obligations create contradictory demands, the burden falls hardest on businesses with the fewest resources to manage it.

The experience of Forestali provides a useful example of how companies manage these challenges in practice. The Italian adhesive specialist, based on the shores of Lake Maggiore, serves customers in footwear, automotive and packaging with tailored solutions developed through close technical collaboration. Its R&D team works alongside a dedicated ESG unit (Environmental, Social, Governance), linking product innovation directly to the certifications and regulatory compliance needed to access and grow in European markets.

We're like chefs in a restaurant: we don't produce the raw materials, but we know how to create solutions that work. And if we are fast, friendly and competent, customers will certainly come back to see us because we solve their problems.

Guido Cami, President & CEO,
Industrie Chimiche Forestali S.p.A.

Maintaining that responsiveness requires predictable, proportionate rules, consistently applied across the Single Market.

www.forestali.it

For SMEs like ours, clear and predictable European rules are essential. They help us invest in innovation, train our people and serve customers across borders with confidence. What we need most is regulation that remains workable and proportionate, so that smaller companies can focus on developing solutions rather than navigating unnecessary complexity.

President Guido Cami