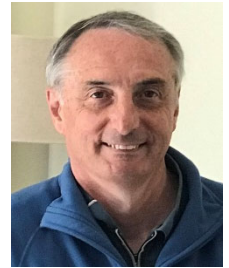


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NAVIGATING THE FUTURE: KEY FACTORS SHAPING ADHESIVES RAW MATERIALS

Europe's adhesives industry is under pressure as local raw material production declines and import dependence grows. High energy costs and global overcapacity have triggered raw material plant closures and squeezed margins. Tackifiers and other key inputs are now largely imported, with China supplying an increasing share. This shift brings both risks and opportunities for supply security and profitability, particularly amid rising geopolitical tensions. In this presentation, we'll examine what's changing, why it matters, and—most importantly—how adhesive companies can stay ahead in a rapidly evolving global landscape.