

Reunion brings great joy

A few weeks ago, the C2 team was live on-site at the Munich Adhesives and Finishing Symposium (MKVS). For us as well, this was the first physical conference after a long corona break. The joy of experiencing top-class lectures and networking in an exclusive setting was clearly visible among all participants. C2 spoke exclusively with the MKVS organiser Stephan Hinterwaldner, who was satisfied with the outcome of a successful event

C2: Mr Hinterwaldner, when you look back on the presentations at this year's Munich Adhesives and Finishing Symposium, what were the main things you learned?

Stephan Hinterwaldner:

Adhesives are enablers! Adhesive bonding (alone and/or in intelligent combination with other joining processes) has been, is and will be in the future, within the framework of the implementation of the sustainability maxim, an even more responsible pioneer for many products, process engineering and technologies, so that our children and grandchildren will also have a future worth living on this planet. We think here first and foremost about the EU Green Deal, the circular economy, the chemicals strategy for sustainability and the renovation wave. In the coming years, we can basically assume that the demand for safe, recyclable, sustainable adhesive products will continue to be very strong, whereby quality and prices will remain decisive.

Adhesives are more in demand than ever! There is an optimistic picture for the current and future situation of the adhesives and sealants market worldwide – despite the current news and reports on the almost historically dramatic shortage of raw materials caused by force majeure, consequences of climate change and/or state-imposed almost nationwide (partial) closures of companies in China due to repeated power supply bottlenecks and measures to reduce CO₂, as well as continued drastically increased delivery costs, etc.

The European adhesives and sealants market is forecast to grow to just over €22 billion by 2026. A compound annual growth rate (CAGR) of 3.6 % is expected for the years 2021 to 2026.



Stephan Hinterwaldner

C2: So new and further developments in pressure sensitive adhesives are driving the future?

S. Hinterwaldner: Correct! Raw material as well as application research and the resulting further developments and innovations cannot be stopped even by a continuing pandemic. Many companies and institutes have used the time in the best possible way to implement findings and results from recently completed or still ongoing projects in novel products, application and process technologies as well as test methods for quality assurance in the broad and trendy spectrum of pressure sensitive adhesives.

This is particularly evident in the area of the two adhesive technologies "hot melt pressure sensitive adhesives" and "water-based adhesives", which together account for about 70% of the worldwide pressure

sensitive adhesives market. Meanwhile, the third largest adhesive technology in the sector, "solvent-based adhesives", with around 27%, continues to grow but at a very slow pace, primarily due to regulatory and environmental concerns.

C2: How would you describe the current situation in the pressure sensitive adhesives market?

S. Hinterwaldner: Very positively indeed! This is true for many pressure sensitive adhesive systems and trendy application areas, despite the current major hurdles caused by the shortage of various raw materials and price turbulences.

Market research institutes such as AWA Alexander Watson Associates estimate the global pressure sensitive adhesives market in 2020 at approximately 2.6 million dry weight, with a steadily growing trend for the coming

years. The two adhesive technologies “pressure sensitive adhesives” and “water-based adhesives” (which together account for around 70% of the global pressure sensitive adhesives market) are also predicted to grow at the highest rate in terms of future growth.

Asia currently represents the largest market with a 46% share. North America and Europe are roughly equal with 23% market share each, South America at 5% and Africa and the Middle East at 3%.

Even in a global pandemic, it can be said – almost traditionally – that the market for pressure sensitive adhesive tapes is closely linked to GDP growth, both in terms of countries and regions.

The current situation as well as the development of this over the foreseeable future can also be well illustrated on the basis of selected influencing factors:

» The automotive market is a focal market for the pressure sensitive tapes market. The industry has recovered from the previous year, although it is now hampered by disruptions in global supply chains and shortages of raw materials. The (current) global semiconductor shortage

is holding back (potential) growth, especially in the automotive industry, but also in the electronics sector as a whole.

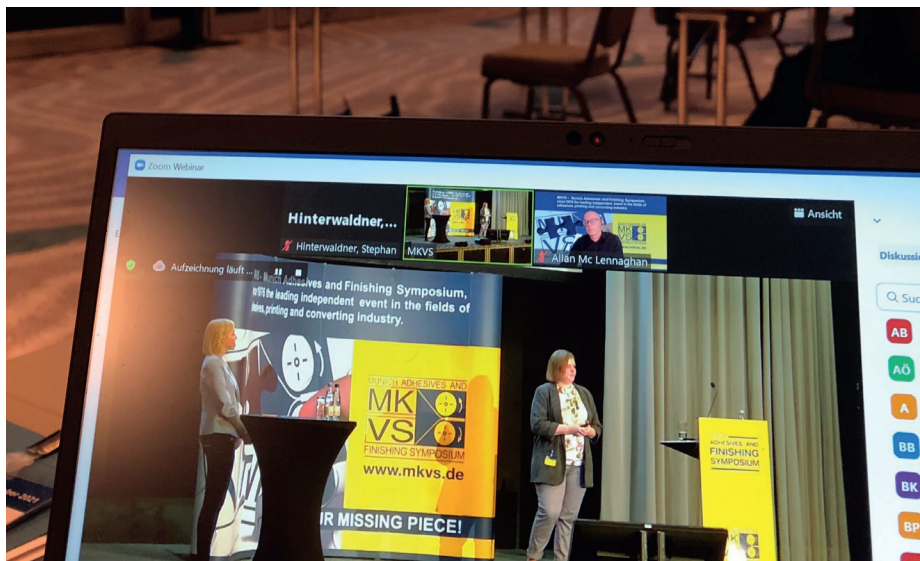
- » Adhesive tapes have replaced mechanical fasteners in several markets and this trend is expected to continue.
- » The boom in the e-commerce market, partly driven by the pandemic, is a key driver for the packaging tape market.
- » E-commerce is driving growth in the printed label market with variable information, which represents about half of the self-adhesive labelstock.
- » The overarching trend in labelstock is sustainability. For adhesives, this means washability, compostability, recyclability and other solutions. Linerless solutions have already seen dramatic growth in recent years, driven by sustainability concerns and cost savings.
- » The hygiene market is primarily driven by an ageing population, which means, among other things, a growing need for adult incontinence products. Similarly, population growth also leads to a greater need for baby diapers, among other things, and eventually

for feminine hygiene products. The penetration of hygiene products in developing regions such as Africa, South East Asia as well as South America is a major driver in the hygiene segment.

C2: Which new applications or projects presented at the Munich Adhesives and Finishing Symposium fascinated you the most?

S. Hinterwaldner: All the presentations this year were impressive in their own way, in their respective areas as well as in their interaction with the other areas. Following the holistic approach, the Munich Adhesives and Finishing Symposium has always tried to deliberately present the entire range of raw materials, applications, process technology and the corresponding technical and mechanical equipment for and in all the adhesive systems and application techniques involved in the respective focus topic.

In this respect, I am particularly impressed by ideas and projects that make it through and with cooperation, right up to application and implementation in the market. I am



Completely hybrid: Whether on-site in Munich, or worldwide via the internet – the MKVS continues to combine “the best of both worlds”

thinking, among other things, of the possible applications of asparagus fibres, the influence of humidity and temperature on the mechanical properties of fibre-based substrates and their relevance for the industrial coating process, as well as the novel backbone polymers based on polyhydroxybutyrate (PHB) and their formulations of pressure sensitive adhesives based on them. The same applies to the contributions devoted to the further development of water-based dispersions in the pressure sensitive adhesives sector and the modern method of coating with UVC pressure sensitive adhesives, also from the point of view of recycling management. Or also those dealing with the mass balance approach and the interesting new sustainable raw material developments based on it. This was also shown by the stimulating discussions in the auditorium and in the networking breaks.

C2: Let's talk about the event itself: After a long break, finally “live networking” again! What feedback did you receive from the participants?

S. Hinterwaldner: Positive all round! It was excellent to experience live networking again after a long break. For many, as well as for us in the Hinterwaldner Consulting team, it had the atmosphere of a successful class reunion. Networking simply works best in direct personal exchange. The breaks, the exhibition in the foyer of the conference room as well as our traditional evening event on Monday were actively used by everyone in the usual informal and

varied setting; for the so important dialogue as well as for (re)networking among “old” as well as “new” acquaintances from industry and science.

Communication, exchange of experience, discussion of presented new ideas, approaches and projects as well as networking with known and new leads has always been everything, also at and for our two Munich Adhesives Symposia by Hinterwaldner Consulting – the Munich Adhesives and Finishing Symposium and the in-adhesives symposium.

What was also very impressive – also for me personally: when, despite the second wave rolling in at the time last year, around 20 on-site participants came to Munich for the 1st Munich Adhesives and Finishing Symposium hybrid (in addition to more than 100 online participants) and engaged in “live networking” for discussion, exchange and contact cultivation in a cosy, manageable round.

C2: Has the hybrid concept proven itself in your view? Will there also be a hybrid event in 2022?

S. Hinterwaldner: Quite clearly YES. Our interpretation of the hybrid format, a variable combination of a “live” with a “virtual” online component, has proven itself, which we have also had confirmed as such by very many participants. Many questions and comments following the lectures came from online participants in particular.

In addition, with the live web streaming and the recording of the lectures, there is

the possibility of a video-on-demand after the event for all registered participants via the conference website. By the way, we had already thought about these options before the pandemic, as there are various reasons why one cannot participate on site.

However, such an interpreted hybrid concept, in which you actually organise two events in one programme, requires a lot of flexibility in the planning, as well as in the implementation up to the last second, when you go “on-air”, especially in a pandemic with rapidly changing situations, rules and regulations. And also patience and understanding on the part of all those involved when one thing or another, for whatever reason, does not go as planned or takes longer than one is used to.

The “old normality” is slowly but steadily returning and will lead us into a “new normality”. And a “new normal” in the conference sector means hybrid. Yes, planning is already underway for our 2022 conferences in hybrid format.

C2: What can visitors look forward to at MKVS 2022?

S. Hinterwaldner: A warm welcome and the usual well-balanced conference programme with enough space for communication, exchange of experience, discussion and networking in the familiar Bavarian atmosphere and cosiness.

The Munich Adhesives and Finishing Symposium 2022 will be dedicated to hotmelts, pressure sensitive hotmelt adhesives, hotmelt compounds and extrudable films in their entire range of raw materials, processing and applications, mainly in paper, plastics and films, self-adhesive materials, packaging and labelling materials, tape & label, coating, converting and laminating, as well as in the non-woven sector.

A small preview and appetiser of this very subject area was provided by this year's closing paper on CABBAGE – Trends in the Packaging Industry and Effects on Coating, Adhesives, Barriers, Branding And Glues.

The 47th Munich Adhesives and Finishing Symposium will take place from 17-19 October 2022, just before the K show. Interested speakers from industry and academia are already invited to submit their innovative presentation proposals and project ideas. ■

Image sources: Hinterwaldner Consulting