

# U.S. policy shifts ripple through Europe's adhesive-tape supply chain

**From tariffs to PFAS rules, evolving U.S. regulation is increasing complexity across the value chain—reshaping sourcing, compliance and competitiveness for Europe's adhesive-tape industry.** *By Bathsheba Fulton, Communications Manager, Afera*

At the start of 2026, I joined a webinar hosted by the Adhesive & Sealant Council (ASC), led by Bill Allmond, President of ASC, which explored the regulatory and policy outlook for the U.S. adhesives and sealants industry in the year ahead. While the discussion centred on the U.S., its relevance for Europe—and for Afera Members—was immediate. The adhesive-tape value chain is inherently global, and developments in U.S. trade policy, chemical regulation and state-level legislation are already influencing how materials are sourced, products are formulated and markets are accessed across Europe.



## **A volatile policy environment with global consequences**

Mr. Allmond described 2025 as a “roller coaster” year, combining supportive federal measures such as tax reform with significant disruption from tariffs and a growing burden of state-level regulation. That volatility is continuing into 2026. A closely divided Congress, an election year and strong executive influence over trade and regulatory decisions are creating a policy environment marked by uncertainty and rapid change. For European companies, this matters directly. The E.U.–U.S. trade relationship remains the largest bilateral trade flow in the world, underpinning a substantial share of global chemicals and materials movement—including many of the polymers, resins and intermediates used in adhesive tapes.

## **Trade uncertainty and tariffs: Pressure on supply chains**

One of the clearest messages from the webinar was the ongoing uncertainty surrounding tariffs and trade policy. ASC members reported that tariffs on both raw materials and finished products have negatively affected their operations, creating unpredictability and complicating sourcing strategies. For the European adhesive-tape value chain, this translates into several practical challenges:

- Disruption to the flow of raw materials and intermediates between regions
- Greater volatility in input costs
- Increased pressure to regionalise supply chains and reduce exposure to geopolitical risk.

In effect, companies are being pushed to rethink sourcing strategies—not only in terms of cost, but resilience.

## PFAS regulation: A shared and intensifying challenge

A central focus of the webinar was the increasing regulatory attention on PFAS. At U.S. federal level, manufacturers face extensive reporting requirements covering PFAS use, production volumes and environmental impacts over a multi-year period, with limited exemptions.

At state level, regulation is accelerating:

- **Minnesota** requires reporting for products containing intentionally added PFAS by July 2026
- **New Mexico** is proposing labelling obligations, including visible and durable consumer warnings
- **Additional states** are introducing or considering bans, reporting schemes and product restrictions.

For European adhesive-tape manufacturers, the implications are significant:

- The need to comply with both E.U. and U.S. regulatory frameworks
- Increased demand for supply-chain transparency and chemical traceability
- Pressure to identify and qualify alternatives to PFAS in specific applications.

With Europe simultaneously advancing its own PFAS restriction proposals, this is a clear case of global regulatory alignment driving material change.

## State-level regulation: Fragmentation and complexity

Another key takeaway was the growing role of U.S. states as regulators, particularly where federal action is perceived as limited. This includes developments in:

- Extended Producer Responsibility (EPR)
- VOC and consumer product regulation
- Product labelling and reporting requirements.

Unlike the E.U.'s more harmonised system, the U.S. regulatory landscape is becoming increasingly fragmented. For European companies operating in or exporting to the U.S., this creates

- multiple compliance regimes across different states
- higher administrative and reporting burdens
- increased complexity in bringing products to market.



This shift towards more localised regulation is not unique to the U.S., but it is particularly pronounced there.

## **Regulation and innovation: A shifting balance**

The webinar also highlighted that regulation is not only a constraint—it is also a driver of change.

While tax reforms in the U.S. aim to support manufacturing investment and R&D, regulatory pressures—particularly around PFAS, VOCs and sustainability—are accelerating innovation across the adhesives and tapes sector. For European companies, this reinforces a familiar dynamic:

- In the short term, increased cost and complexity
- In the long term, opportunities for innovation, differentiation and more sustainable product design.

## **What this means for Europe's adhesive-tape value chain**

The key message from the webinar is clear: Policy and regulation are now central to how the adhesive-tape industry operates and competes. For Afera Members, this translates into three priorities:

- **Strengthening supply-chain resilience**  
Sourcing strategies must increasingly account for trade risk and regulatory exposure.
- **Building regulatory intelligence**  
Monitoring developments across jurisdictions is essential to maintaining compliance and market access.
- **Enhancing value-chain co-ordination**  
Closer collaboration between suppliers, manufacturers and end users will be needed to ensure transparency, compliance and performance.

## **A transatlantic signal for the future**

Although focused on the U.S., the themes of the webinar reflect broader global trends. Trade uncertainty, regulatory fragmentation and sustainability-driven policy are reshaping how materials are produced, regulated and traded. For Europe's adhesive-tape industry, the conclusion is straightforward: Policy is no longer a background factor—it is a defining force. Those companies that anticipate and integrate these dynamics into their strategy will not only remain compliant—but competitive.

To learn more about upcoming webinars from ASC, please visit <https://www.ascouncil.org/events/webinars>.

For more information about the European adhesive tape industry, visit [www.afera.com](http://www.afera.com).

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