

Proof becomes the new pressure point for Europe's tape value chain

Europe's adhesive tapes value chain is being reshaped by raw-materials pressure, regulation, carbon data, circularity and higher-performance applications. The common thread is evidence: tapes must now prove not only that they work, but that they work reliably, transparently and within more demanding systems.

Europe's adhesive tapes industry is dealing with several structural changes at once. Feedstocks, polymers, tackifiers, silicones, papers, films, foams, liners, coatings, adhesives, converting equipment and finished tapes are all being affected by supply instability, regulatory pressure, carbon reporting, recycling expectations, higher performance requirements and faster product-development cycles. These pressures are changing how tapes are designed, produced, specified, converted, documented and recovered.



The market remains commercially resilient. Grand View Research estimates the global adhesive tapes market at USD 84.0 billion in 2025, rising to USD 138.1 billion by 2033, with a projected CAGR of 6.6% from 2026 to 2033. Its [Europe-specific outlook](#) estimates the European adhesive tapes market at USD 20.8 billion in 2025, with expected growth of 6.4% CAGR from 2026 to 2033. Behind those figures, the value chain is becoming more segmented, more data-intensive and more closely tied to end-use performance.

Afera's Membership reflects that shift. The Association brings together raw-material suppliers, adhesive formulators, tape manufacturers, converters, release-liner specialists, film and paper suppliers, machinery companies, research institutes and international associations. The trends now shaping the sector move through the whole chain, from material selection and coating to converting, customer qualification, regulatory evidence and end-of-life handling.

Raw-materials pressure moves upstream risk into the boardroom

Raw materials are now one of the clearest pressure points in the European adhesive tapes value chain. The sector depends on acrylics, rubbers, silicones, tackifiers, resins, hot melts, dispersions, solvents, additives, films, papers, foams, nonwovens and release liners. Many of these inputs are exposed to the same pressures affecting Europe's chemical base: high energy costs, import dependency, plant closures, global overcapacity and weaker demand in some industrial sectors.

[Cefic reported in January 2026](#) that European chemical plant closures had increased sixfold since 2022, reaching a cumulative 37 Mt of capacity, equal to around 9% of European production capacity. It also reported 20,000 direct job losses in the chemical industry. For tape companies, procurement is now linked to business continuity, reformulation, supplier intelligence and closer technical co-operation with upstream partners.

Afera Members such as [BASE](#), [Dow](#), [Synthomer](#), [H.B. Fuller](#), [Henkel](#) and [artimelt](#) sit close to this trend because their polymers, adhesives, tackifier resins, hot melts, silicone systems, release coatings and PSA technologies feed directly into pressure-sensitive tape systems. Raw-materials management is therefore no longer only about availability and price. It is also about substitution, compliance, lower-fossil formulations and long-term product performance.

Regulation moves into product design

Regulation is increasingly influencing product design before a tape reaches the market. The [Packaging and Packaging Waste Regulation](#), REACH, the PFAS restriction process, the [microplastics restriction](#), the Ecodesign for Sustainable Products Regulation and related product-data initiatives are all affecting how tapes are specified and documented. The key questions are where the tape is used, what it is attached to, whether it affects recyclability and what information must move through the value chain.

The PPWR is particularly relevant for tapes used in or on packaging. Regulation (E.U.) 2025/40 entered into force on 11 February 2025 and will generally apply from 12 August 2026. It covers all packaging and packaging waste placed on the E.U. market and introduces requirements relating to packaging design, recyclability, re-use, waste prevention and material recovery. For packaging tapes, the question is no longer only whether the tape closes a carton, but whether it works within a packaging system that can meet future recyclability and documentation requirements.

This affects Members active in packaging tapes and packaging-related materials and also touches suppliers of paper, film and packaging substrates. The impact differs by product and position in the chain, but the direction is consistent: Packaging performance, recyclability, material efficiency and documentation are becoming inseparable.

Carbon data and circularity become commercial requirements

Carbon reporting has moved from sustainability language into commercial infrastructure. Customers increasingly want product carbon footprint data to support Scope 3 reporting, supplier comparison, tenders and internal sustainability targets. In adhesive tapes, that data depends on the adhesive, backing, liner, coating process, curing or drying energy, packaging, transport and end-of-life assumptions.

[Afera's TACK tool](#), developed with IVK, provides a web-based product carbon footprint calculation approach for adhesives and tapes. TACK aligns with ISO 14067, ISO 14040 and Together for Sustainability (TfS) guidance and has been third-party verified by DEKRA. The value chain needs comparable methods, not isolated claims, and TACK gives tape and adhesive companies a common framework for calculating and communicating PCF data.

Member sustainability reporting shows how quickly this is becoming quantified. [tesa reported in April 2026](#) that by the end of 2025 it had reduced fossil virgin plastics in packaging by 63%, reached 32% recycled and bio-based materials in products and was working towards a 70% target by 2030. [Nitto reported](#) a 54% waste-plastics recycling ratio in fiscal 2025 and a 24% sustainable-materials procurement ratio. Technical performance still comes first, but evidence on carbon, materials and resource use is now part of the commercial offer.

Circularity is becoming more specific for the same reason. Release liners comprise nearly one-third of a technical tape and quickly become waste once the tape is applied. [Afera's 2026 release-liner FAQ](#) estimates that around 80% of tape liners are filmic and around 20% are paper-based, with recycling routes depending on material type, contamination and separation. [Ahlstrom](#), [Loparex](#), [Mondi](#), [UPM Specialty Papers](#) and [Siliconature](#) are among the Members connected to release-liner design, liner recycling and specialty substrates.

Packaging and e-commerce reshape tape requirements

Packaging remains one of the largest end-use areas for pressure-sensitive tapes, but the requirements are shifting. E-commerce supports demand for carton sealing, return logistics, tamper evidence, automated application and performance across variable transport conditions. Regulation and sustainability pressure are also pushing packaging towards lighter materials, recycled fibre, right-sized parcels and stronger recycling compatibility.

[Eurostat data](#) show the scale of the issue. The E.U. generated 79.7 million tonnes of packaging waste in 2023, equal to 177.8 kg per inhabitant. Paper and cardboard accounted for 40.4% of that waste, plastic for 19.8%, glass for 18.8%, wood for 15.8% and metal for 4.9%. E-commerce adds further demand: In 2025, [78% of E.U. internet users](#) had bought or ordered goods or services online, up from 62% in 2015.

For Members active in packaging tapes and systems, including [Intertape Polymer Europe](#), [PPM Industries](#), [Shurtape Technologies](#) and [Atlas Tapes](#), this creates demand for tapes that perform on recycled and lower-weight boards, run reliably on automated lines and support packaging systems under PPWR scrutiny. [Valco Melton](#) also sits close to this trend through adhesive application and dispensing systems used in packaging and converting environments.

Specialty applications raise the performance bar

Specialty tapes are gaining strategic value because customers increasingly need application-specific performance rather than standard fixing or sealing. This applies across automotive, electronics, healthcare, construction, graphics, energy, aerospace, industrial assembly and surface protection. In these markets, value is created through adhesive chemistry, carrier selection, release-system design, converting precision, testing, documentation and application support.

Afera Members show the range of this trend. [3M Deutschland](#) has a broad high-performance tape portfolio for automotive, construction, electronics, healthcare and general industry. [ADESIA](#) develops and manufactures PSA tape solutions for industrial, automotive, construction and medical applications. [Adhesives Research Ireland](#) serves healthcare, electronics, industrial, EV battery, display, solar, smart-glass and splicing applications, while [ADHEX Technologies](#) works with PSA tapes and films for automotive, medical, building, electronics and hygiene applications.

[Henkel's acquisition of ATP adhesive systems](#) underlines the strategic value of specialty tape capability. Henkel described ATP as a specialist in high-performance water-based specialty tapes for automotive, electronics, medical, building and construction, and graphics applications, with around 700 employees and expected fiscal-year 2025 sales of around €270 million. The deal shows how specialty tape technology is becoming a strategic industrial capability, particularly where performance, sustainability and water-based technologies intersect.

E-mobility turns tape into an engineering component

Automotive electrification is changing the role of adhesive tapes. Battery systems, power electronics, lightweight assembly and vehicle interiors require materials for bonding, insulation, thermal management, vibration damping, masking, sealing, wire harnessing and surface protection. In these applications, tape is not a secondary consumable. It is often part of the engineering system.

[ACEA reported](#) that 1,880,370 new battery-electric cars were registered in the E.U. in 2025, giving BEVs a 17.4% market share. In the first five months of 2026, [950,521 new BEVs were registered](#), accounting for 20% of the E.U. market. This shift is changing materials demand in battery packs, component assembly, electrical insulation, thermal interfaces and production processes.

Members active in this space include 3M, [tesa](#), [Lohmann](#), [Nitto](#), [Saint-Gobain Tape Solutions](#), [Orafol](#), AFTC and [ATP](#). AFTC is positioned around double-sided acrylic foam tapes used in demanding bonding applications. Saint-Gobain Tape Solutions offers high-performance bonding, gasketing, specialty films and thermally conductive materials, while ORAFOL has promoted solvent-free adhesive tape systems for automotive interiors with low odour, low VOC and fogging properties. The common requirement is evidence: Automotive tapes must meet strict performance, ageing, safety and process-integration demands.

Construction, healthcare and electronics intensify technical demands

Several end-use markets beyond packaging and automotive are raising the performance threshold. In construction, the [E.U. Renovation Wave](#) aims to renovate 35 million buildings by 2030 and at least double the annual rate of energy renovations. That reinforces demand for airtightness, moisture control, insulation, façade systems, roofing, window installation, repair and durable building envelopes. [SIGA](#), [Carlisle CM Europe](#), [Advance Tapes](#), [Bostik](#), H.B. Fuller, Henkel, [Scapa](#), tesa, [Trocellen](#) and [Sekisui Alveo](#) are among the Members active in this area.

Healthcare and wearables create a different performance challenge. Grand View Research estimates that Europe's medical adhesive tapes market generated USD 2.006 billion in revenue in 2024 and is expected to grow at 6.2% CAGR from 2025 to 2030. Mordor Intelligence estimates the global wearable adhesive market at USD 5.80 billion in 2025, rising to USD 10.37 billion by 2031. In these applications, tapes must hold securely while releasing gently, with attention to breathability, conformability, moisture management, biocompatibility, comfort, residue and skin irritation. Adhesives Research, [ADDEV Materials](#), ADHEX Technologies, artimelt, Lohmann, Nitto, [Nichiban Europe](#), Scapa and tesa are among the Members active in medical and skin-contact applications.

Electronics and semiconductor-related applications are also becoming more demanding. The [European Chips Act](#) aims to strengthen Europe's semiconductor ecosystem and support the E.U.'s target of

doubling its global semiconductor market share to 20%. Growth in power electronics, data centres, AI infrastructure, ADAS, advanced packaging and e-mobility increases demand for tapes with tighter cleanliness, thickness control, dimensional stability, thermal conductivity, dielectric properties, flame resistance, low outgassing and residue-free removability. Members active in this space include 3M, Adhesives Research, ADHEX Technologies, Dow, Henkel, Lohmann, Nitto, Saint-Gobain Tape Solutions, tesa and [Poly-Chem](#).

Converting and digitalisation become strategic capabilities

As tapes become more specialised, the ability to coat, laminate, slit, rewind, die-cut, cleanly convert and document them becomes more important. In medical, electronics, automotive, aerospace, construction and surface protection, the usable product may be a die-cut part, a laminated structure, a kit, a precision roll or a customer-specific format rather than a standard roll.

ADDEV Materials is a clear example, offering [custom converting for healthcare, automotive, electronics, aerospace and general industry](#), supported by multiple industrial plants, cleanroom capability and medical-device quality systems. [Stokvis Tapes Benelux](#), [Tape Converters Holland](#), [Volz Selbstklebetechnik](#), Trichem Poland and Tapeservice also sit in the value-added converting space, where customer-specific formats, traceability and application knowledge increasingly matter.

Machinery Members support the same trend from the production side. [KROENERT](#) supplies coating and laminating lines for pressure-sensitive adhesives, release coatings, primers and functional layers on paper, film, foil and textile substrates. [Ghezzi & Annoni](#) manufactures converting equipment for self-adhesive materials, while [Elite Cameron \(TS Converting Equipment\)](#) and [Matthews Engineering](#) support slitting, coating, laminating, curing, calendaring and process efficiency.

Digitalisation is accelerating this shift. AI, materials informatics, lab automation and predictive modelling are being used to shorten development cycles, screen formulations and support reformulation when raw materials or regulatory requirements change. [Adhesives & Bonding Expo Europe](#) has cited potential reductions of 50-80% in the number of experiments needed to hit formulation targets, while [Nature research](#) shows how data mining, experimentation and machine learning can support adhesive development. [Fraunhofer IFAM](#), KROENERT, Matthews Engineering, Ghezzi & Annoni, TS Converting Equipment and Valco Melton are among the Members linked to research, process technology and production capability.

Co-ordination turns evidence into competitiveness

Regulatory change, product carbon footprinting, circularity, test methods, release-liner recovery, market data and product classification all require information to move between companies, countries and sectors. These issues cannot be solved efficiently through isolated customer requests. They need shared methods, common terminology and pre-competitive technical alignment.

Afera's work on the [TACK PCF tool](#), [release-liner sustainability](#), [regulatory affairs](#), [technical standards](#), [market data](#) and [European Tape Week](#) reflects a sector that needs stronger cross-chain infrastructure. [IVK](#), [PSTC](#), [CATIA](#), [JATMA](#), [TAAT](#), [Federazione Gomma Plastica](#), Fraunhofer IFAM and [RESET Consulting](#) also connect to this wider co-ordination trend through technical work, regulatory monitoring, research, market intelligence and international dialogue.

Across these trends, proof is becoming the operating standard. The European adhesive tapes value chain is being asked to prove performance, compliance, carbon data, recyclability claims, supply resilience, safe substitution, application value and end-use compatibility. Adhesion, durability, processability and cost still matter, but they now sit inside a wider evidence framework.

Further information

- [Afera, TACK product carbon footprint calculation tool](#)
- [Afera, Sustainable Management of Adhesive Tape Release Liners](#)
- [Afera, Recycling Release Liners from Adhesive Tapes FAQ](#)
- [Grand View Research, global adhesive tapes market report](#)
- [Grand View Research, Europe adhesive tapes market outlook](#)
- [Cefic, European Chemical Closures and Investments Radar 2022-2025](#)
- [European Commission, Packaging and Packaging Waste Regulation overview](#)
- [Eurostat, E.U. packaging waste statistics](#)
- [Eurostat, E-commerce statistics for individuals](#)
- [ACEA, E.U. car registrations in 2025](#)
- [ACEA, E.U. car registrations January-May 2026](#)
- [Grand View Research, Europe medical adhesive tapes market outlook](#)
- [Mordor Intelligence, wearable adhesive market forecast](#)
- [European Commission, Renovation Wave](#)
- [European Commission, European Chips Act](#)
- [Henkel, acquisition of ATP adhesive systems](#)
- [Adhesives & Bonding Expo Europe, AI in adhesive formulation](#)
- [Nature, data-driven adhesive hydrogel research](#)
