

1st Afera Member Radar Survey captures industry pressure points

Presented for the first time during Afera's 68th Annual Conference in Thessaloniki, the new Afera Member Radar Survey reveals how European adhesive tape companies are balancing sustainability demands, rising costs and intensifying global competition.



At Afera's 68th Annual Conference during the [1st European Tape Week in Thessaloniki](#), Members received a new kind of market insight. Alongside external data from Freedonia and AWA, Brenden Drijgers of Kraton Corporation and the Afera Marketing Committee presented the first *Afera Member Radar Survey*: a direct snapshot of how Afera Members themselves see the European adhesive tape market developing. The initiative was designed to complement broader market data with direct Member sentiment and practical industry experience from across the European adhesive tape value chain.

The survey was developed because external market reports can show where demand, production and regional growth are moving, but they do not always capture how companies within the industry are experiencing those developments in real time. Afera therefore asked Members what they see happening now, what concerns them most and which trends they believe will shape the market in the years ahead. In this way, the survey forms part of Afera's broader Market Intelligence work while keeping Member experience and perspective at the centre.

Conducted during August and September 2025, the survey received 41 responses from Afera's approximately 110 Member companies. Respondents included tape manufacturers, raw-material suppliers, converters, distributors and equipment suppliers, giving the results a broad cross-section of the value chain. The companies represented also serve a wide range of downstream sectors, including construction, automotive, paper and graphics, packaging and e-commerce, electronics, furniture and appliances.

A sector under pressure from both cost and competition

The survey findings pointed to an industry operating under pressure from several directions at once. Members identified price sensitivity and cost pressure as the strongest current market drivers, followed closely by competition from non-E.U. imports and rising labour and energy costs. At the same time, overall European demand was seen as broadly stable, suggesting that the challenge for many companies is not simply weak market demand, but increasing pressure on margins and competitiveness.

The results also revealed clear divergence between end-use sectors. Defence, renewable energy and medical applications were generally viewed as growth areas, while automotive was seen as weakening. Construction was regarded as relatively stable and carried one of the lowest uncertainty levels in the survey, indicating that respondents felt comparatively confident in their assessment of that market. Packaging and e-commerce likewise remained important focal areas, particularly in light of continuing sustainability pressures and changes in shipping and logistics.

Asia-Pacific competition emerged as one of the clearest long-term concerns. Members expect APAC supply into Europe to continue increasing, while European production was viewed as broadly stable but with a tendency to decline over time. Around one-third of respondents also indicated that market conditions outside Europe differ substantially because of lower production costs and lighter regulatory requirements in other regions. Taken together, the responses suggest a growing concern that European producers must compete internationally while operating under structurally higher cost and compliance burdens.



Sustainability is driving change, but proof and cost still decide

Sustainability and regulation formed the second major theme running through the survey. Members identified PPWR, REACH, EUDR and CSRD as the regulations currently having the greatest impact on their businesses. In response, companies are increasingly focusing their technical and product-development work on recycled materials, solvent-free systems, biodegradability, waste reduction, UV curing and downgauging. Many respondents also reported investing internally in compliance systems, raw-material assessments, PCF monitoring, recycling initiatives and LCA work. Half of respondents already perform LCAs for at least part of their product portfolio, while another quarter plan to begin.

The technical direction of the industry was equally clear. Solvent-based systems are expected to decline, particularly in packaging applications, while water-based and UV-cured technologies continue gaining momentum. Hot-melt systems were also viewed positively, although more moderately. Recycled and paper-based backing materials showed the strongest expected growth, while PVC trends downward. PLA attracted interest as a possible future material pathway, though responses also revealed relatively high uncertainty surrounding its long-term role and performance.

At the same time, the survey showed that the transition towards more sustainable materials and systems is far from straightforward. Across recycled, bio-based and biodegradable materials, cost remains the single largest barrier to adoption. Technical performance, recyclability uncertainty and lack of market demand were also identified as important obstacles. Interestingly, lack of market awareness was not seen as the primary issue. Instead, the findings suggest that many customers already understand sustainability concepts, but remain cautious about cost, performance and practical implementation. The overall message from Members was therefore clear: Sustainability is increasingly shaping the industry, but solutions must also be technically reliable, commercially viable and supported by credible evidence.

Following the presentation in Thessaloniki, the survey initiative was discussed further during Afera's Marketing Committee and Steering Committee meetings in March 2026. Both Committees confirmed that the *Member Radar Survey* should become a recurring part of Afera's Market Intelligence work and should be conducted at least once a year. The late-summer timing used in 2025 was viewed positively because it allows fresh results to be presented during the Annual Conference itself.

At the same time, discussion also took place around whether the survey should eventually be conducted more frequently, for example biannually or quarterly, in order to give Afera a more regular and timelier picture of changing market conditions. Members can review the complete survey outcome and presentation materials in Afera's [Members-only section](#).

For Afera, the survey has already become more than a one-off exercise. It is evolving into a practical tool for tracking Member sentiment, identifying pressure points and strengthening the Association's voice on the European adhesive tape industry. As Afera continues developing its Market Intelligence pillar, this Member-led input will help build a clearer understanding of how global and European market developments are being experienced inside the sector itself.

Further information

- [Afera Member Radar Survey 2025: The European tape sector in duality \(Members only\)](#)
