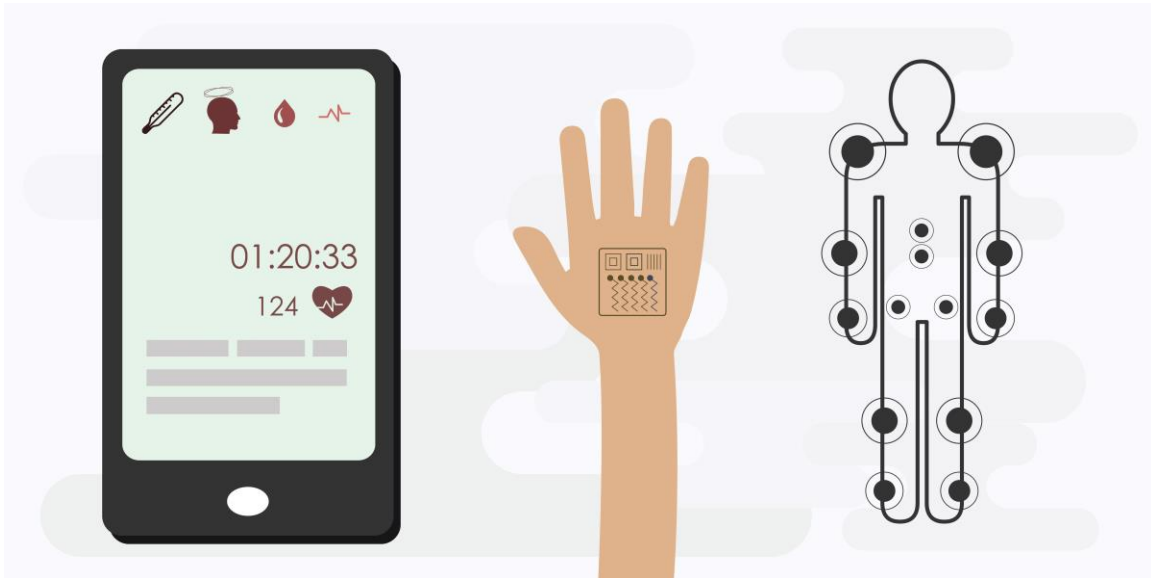


Global and European specialty tape pulse check

The global specialty tape market, representing around 15% of total pressure sensitive tape demand, is poised for moderate but innovation-led growth driven by sectors such as EVs, medical wearables and construction. Afera's upcoming European Tape Week in Thessaloniki will highlight these trends, with exclusive insights from AWA's latest market report.



One of Afera's key Member benefits is enhanced access to market data and related insights. Our upcoming 1st European Tape Week, taking place from 22 to 26 September at the Hyatt Regency in Thessaloniki, Greece, features a packed agenda of presentations and panel discussions covering global and European economic, business, and innovation data, along with emerging trends.

During the Annual Conference on Friday, 26 September, Corey Reardon, President & CEO of AWA Alexander Watson Associates, and Consultant Ephraim Angelo Reyes will present "Global and European Market Data Report Update: AWA's Global Specialty Pressure-Sensitive Tapes Market 2025 – Plus Trends and Other Insights" as part of the morning programme.

A unique market with new opportunities

In the lead-up to the event, AWA is offering Afera members an exclusive 20% discount on the AWA Pressure Sensitive Tape Market Report, 2025 Edition (see "Ordering the 2025 Edition of the Report" below).

Specialty tapes represent a thriving market, currently accounting for 15% of the total tapes sector. These products encompass a wide variety of constructions and applications. Their capacity to integrate diverse materials and formats makes specialty tapes a particularly dynamic

segment, delivering tailored solutions across many use cases. New adhesive technologies continue to emerge, developed to perform in extreme environmental conditions. Globally, the largest end-user sectors for specialty tapes include electronics, medical, automotive, and white goods, with adoption growing in other areas as well.

The 2025 Report explores key trends within the specialty pressure-sensitive tapes industry, examining the market from regional, application, and materials perspectives. As a market with considerable growth potential, the report analyses not only current figures but also projections over the next three years, highlighting the trends and developments expected to drive growth. The report concludes with a listing of leading companies and suppliers across various stages of the value chain. Notably, this edition has been expanded to include additional insights on packaging tapes, masking tapes, and consumer/office tapes.

At Afera's last Annual Conference, Mr Reardon presented highlights from AWA's 2024 Edition of the Pressure Sensitive Tape Market Report. Below is a summary of the most critical findings: The global specialty PST market is poised for moderate growth, spurred by innovations in electric vehicles (EVs), medical wearables, and lightweight bonding technologies. While the Asia-Pacific region remains dominant in terms of volume, Europe and North America are becoming increasingly attractive due to policy changes, reshoring trends, and sustainability imperatives. Material trends are shifting towards PET, bio-based polyolefins, and non-wovens, with growing customer focus on recyclability, life cycle data, and Scope 3 emissions transparency.



AWA Pressure-sensitive Tape Market Report 2025

What the 2024 study covered and how the numbers were built

AWA restrict the term “specialty pressure sensitive tape” to industrial and graphics/assembly tapes and exclude packaging, masking and consumer/office grades. Data were compiled with AWA's usual triangulation approach – annual primary surveys and interviews along the tape value chain, cross-checked with liner, adhesive and raw-material statistics, plus IMF, Eurostat and customs data, and recalibrated each year to avoid roll-forward distortion.

Global market size and growth outlook

2023 volume	Share of total PST	2024-26 CAGR*	Main remarks
All pressure-sensitive tapes: 52.6 bn m ²	100 %	+2.9 %	Stable packaging demand but slower electronics & construction
Specialty tapes: 7.7 bn m ²	15 %	+2.5 %	Growth led by substitution of mechanical fasteners and new EV/electronics assemblies

*three-year forecast published Sept-2024.

Regional dynamics

- Asia-Pacific still produces over half of world specialty-tape volume, but its annual growth has cooled to ~3 %.
- North America is rebounding faster (+3.4 % CAGR) due to reshoring and infrastructure investment.
- Europe remains sluggish (+1.8 % CAGR), but revival is expected through chip-plant and EV rule changes.
- South America forecasts steady 2.4 % CAGR with hygiene and white-goods exports.



End-use mix – where the sqm are going

End-use segment (global 2023)	Share of specialty tape vol.	2023 YoY	2024-26 CAGR	Drivers & watch-outs
Electronics & electrical	17 %	–4 %	+2.5 %	Smartphone/BMS demand paused in 2023; flex circuits and heat-management tapes rebound expected
Medical & hygiene	16 %	+3 %	+3.0 %	Ageing population; switch to skin-friendly & breathable constructions
Automotive (incl. EV)	14 %	+4.6 %	+2.8 %	Wire-harness, lightweight bonding; EU incentives for local EV assembly, tariffs on Asian EV imports
Building & construction	13 %	–2.3 %	+3.4 %	Energy-efficiency retrofits in US & EU push sealing/insulation tapes despite short-term housing slump
Aerospace	5 %	+7.4 %	+4.0 %	Aircraft production recovery; flame-retardant PE & PTFE tapes
White/Brown goods, graphics, defence, sport etc.	35 % (combined)	mixed	2–3 %	Niche growth pockets – premium appliances, wearable electronics, sporting-goods laminates.

Substrate trends

- **PVC film** remains the single largest backing (~17 % of global specialty tapes) thanks to electrical insulation and surface-protection lines but is slowly losing share to halogen-free PET and PO films.
- **PET film** enjoys above-average growth in electronics modules and battery cell wrapping.
- **Non-woven** carriers are expanding in medical fixation and high-airflow construction tapes (CAGR 2.9 %).
- **Foam tapes** (11 % share) slowed to <1 % 2023 growth amid muted automotive output, but EV battery-pack gasketing is a medium-term tailwind.

Europe in focus

- **Total European PST market:** 9.1 bn m²; **specialty share:** 1.4 bn m² (16 %).
- **Sub-regional hot spots** – Germany & France together drive >40 % of EU specialty-tape demand, so weak German construction and ICE vehicle production caused 2023 under-performance.
- **Key industrial signals**
 - **Automotive:** EU “Net-Zero Industry Act” and local-content EV incentives expected to lift high-bonding acrylic-foam tapes from 2025.

- **Semiconductors:** The European Chips Act (Sept-2023) will bolster tape volumes for clean-room masking and insulation during fab build-out.
- **Mechanical-fastener substitution:** OEMs pursue weight and noise reduction, expanding the addressable market for double-sided, structural and thermal-interface tapes across vehicle interiors, batteries and electronics modules.
- **Sustainability:** Rapid formulation work on PCR-content backings, bio-based acrylics and solvent-free processes; recyclability and LCA data are increasingly decisive in RFQs.



Strategic take-aways for the value-chain

1. **Prepare for moderate, innovation-driven growth** – absolute sqm expansion is slowing, but *share-shift* opportunities (mechanical fastening, EV, medical wearables) can outrun the headline CAGR.
2. **Get region-specific** – Asia remains volume king yet will no longer deliver double-digit growth; balancing capacity towards North America and niche EU applications reduces volatility.
3. **Raw-material plays matter** – PET and bio-based polyolefins offer the best growth runway; PVC demand will erode under RoHS-type pressure.
4. **Collaborate upstream on data** – AWA's yearly baseline reset and liner-to-tape triangulation underscore the value of accurate, shared metrics for cap-ex and M&A decisions.
5. **Keep sustainability credible** – customer audits increasingly extend to Scope-3 emissions; PCR content, closed-loop liner schemes and energy-efficient coat-weights will be the competitive differentiators.

Bottom line

Specialty pressure-sensitive tapes remain a resilient, high-value niche ($\approx 15\%$ of global PST area). While sheer volume growth has decelerated – especially in Asia – the shift to lightweight bonding, electrification and medical self-adhesives promises solid mid-single-digit expansion for innovators that align products with regional policy and sustainability demands. Value-chain players who invest now in material transitions,

application-engineering and collaborative data sharing will capture the lion's share of future sqm – and margin.

AWA

Alexander Watson Associates

Ordering the 2025 Edition of the *Report*

Afera Members receive an exclusive discount of 20% on AWA's latest *Pressure Sensitive Tape Market Report*. To order,

follow the link [here](#) and use the code: **AFERA20**. Download a brochure for Afera Members about the *Report* [here](#).