

# PRESSURE-SENSITIVE TAPE MARKET & RELEASE LINER USAGE SUSTAINABILITY & RECYCLING: CASE STUDIES

Corey M Reardon, President & CEO | AWA Alexander Watson Associates

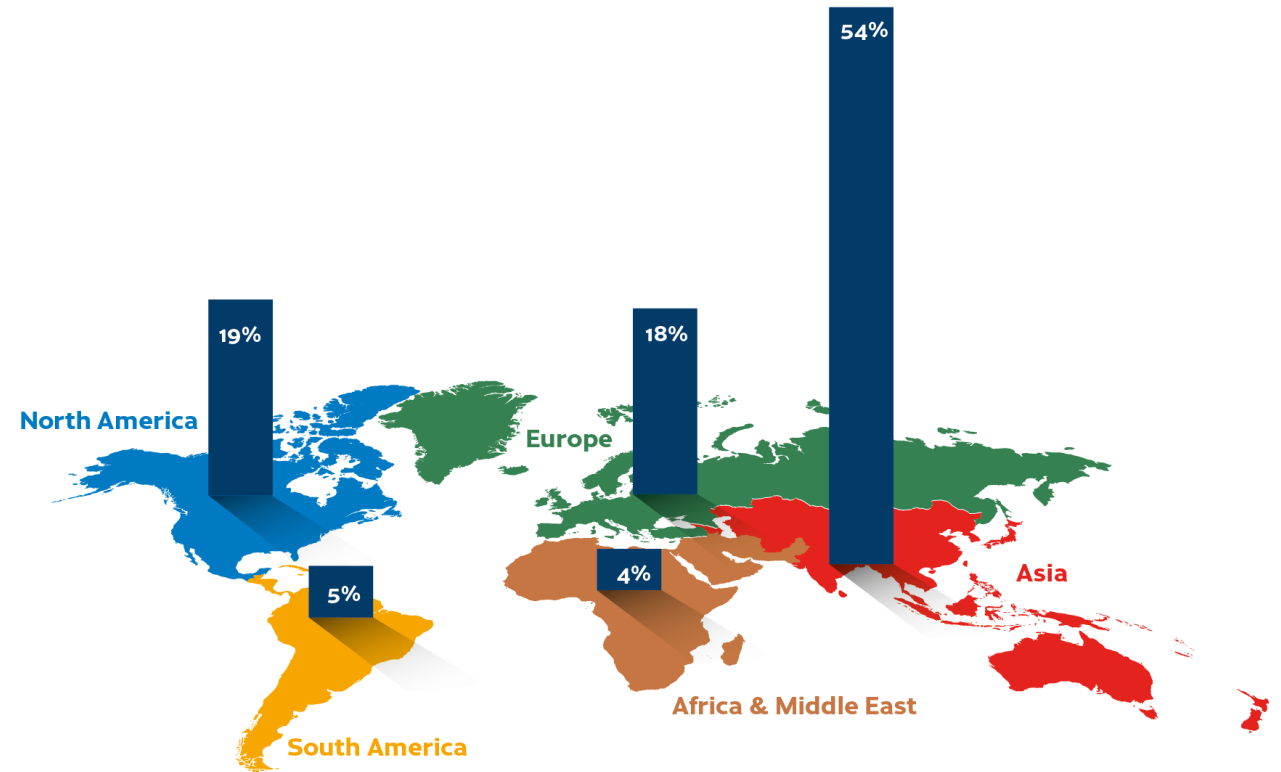
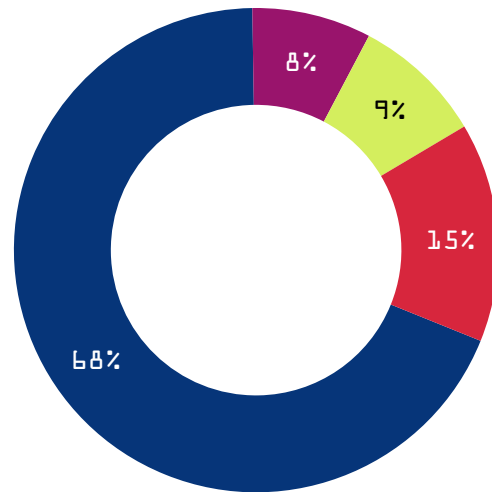
Afera Annual Conference 2021 | Pre-event  
Webinar, September 9



# GLOBAL PRESSURE-SENSITIVE TAPE MARKET

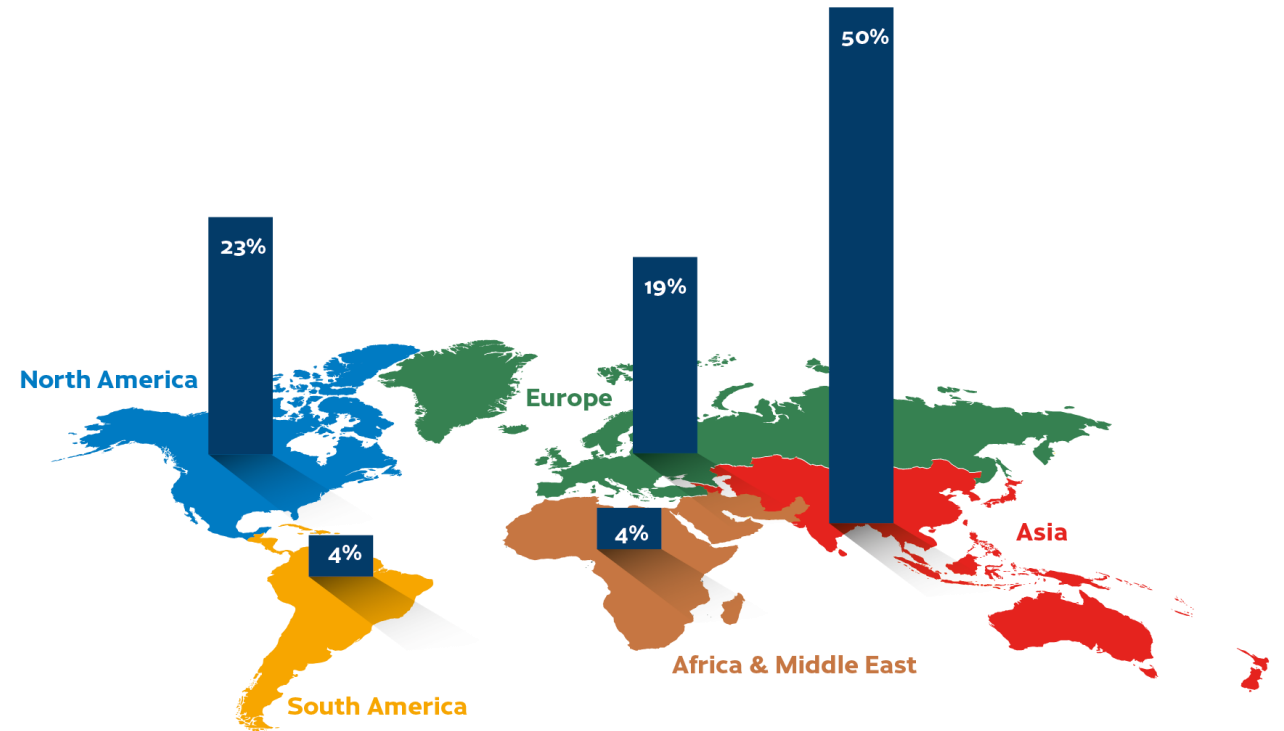
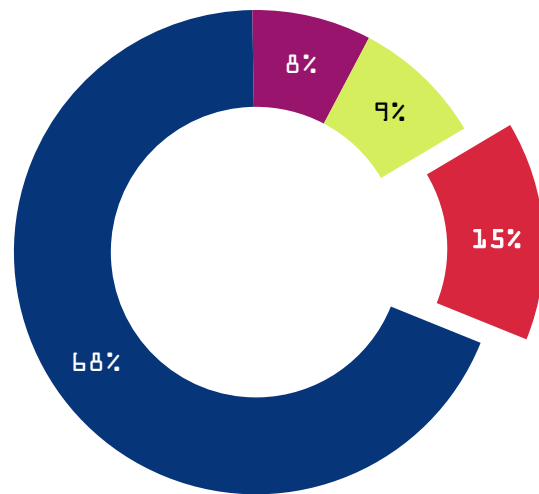
# GLOBAL PRESSURE-SENSITIVE TAPE MARKET

- Packaging Tapes
- Masking Tapes
- Consumer/Office Tapes



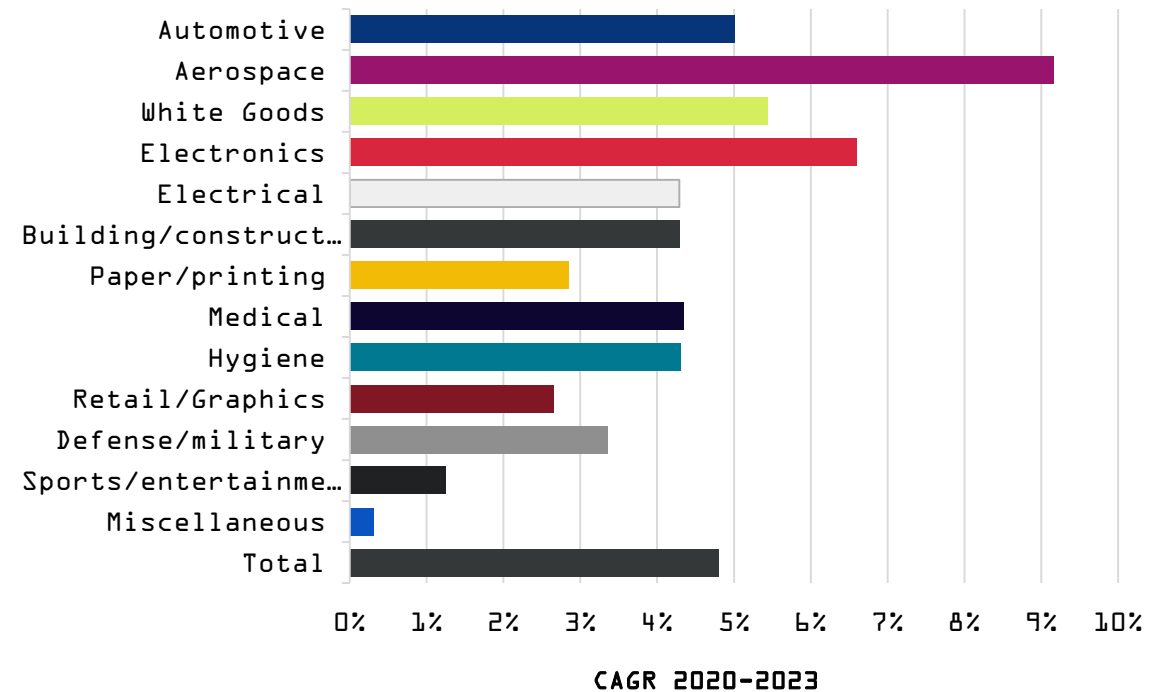
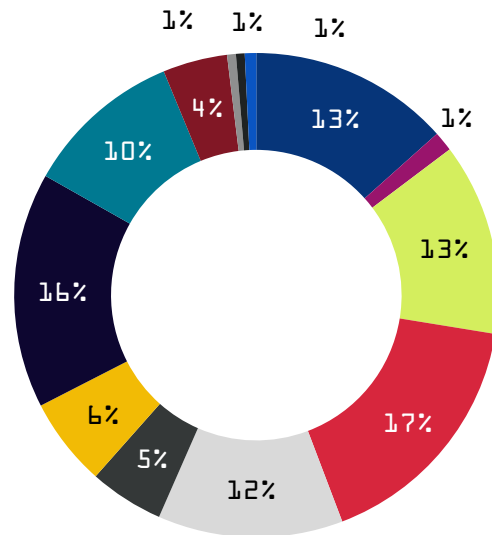
# GLOBAL SPECIALTY PRESSURE-SENSITIVE TAPE MARKET

- Packaging Tapes
- Masking Tapes
- Consumer/Office Tapes



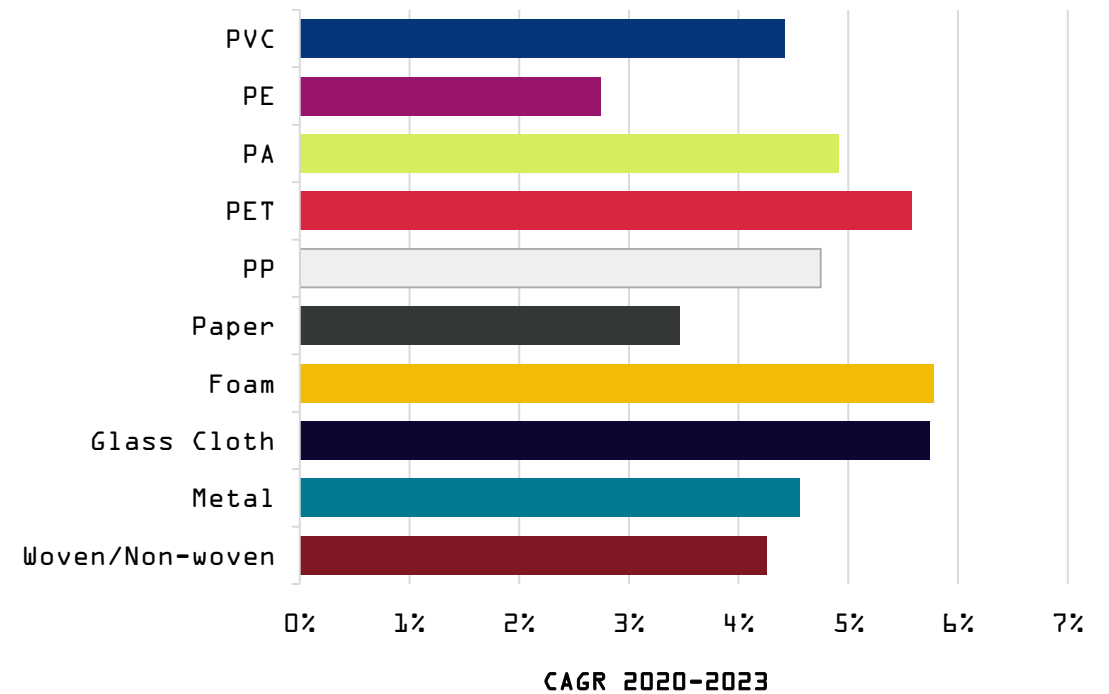
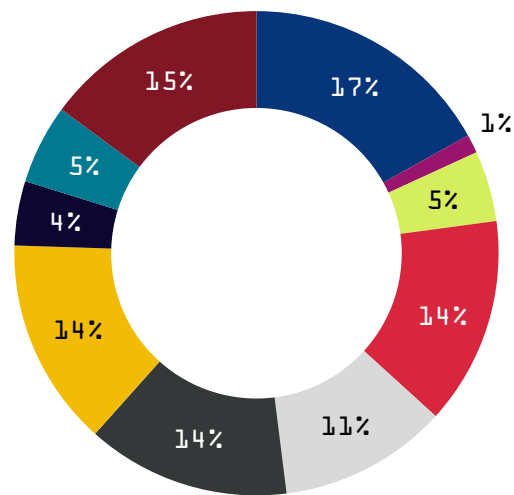
# GLOBAL SPECIALTY PRESSURE-SENSITIVE TAPE MARKET BY END-USE SEGMENT

- Automotive
- Aerospace
- White Goods
- Electronics
- Electrical
- Building/construction
- Paper/printing
- Medical
- Hygiene
- Retail/Graphics

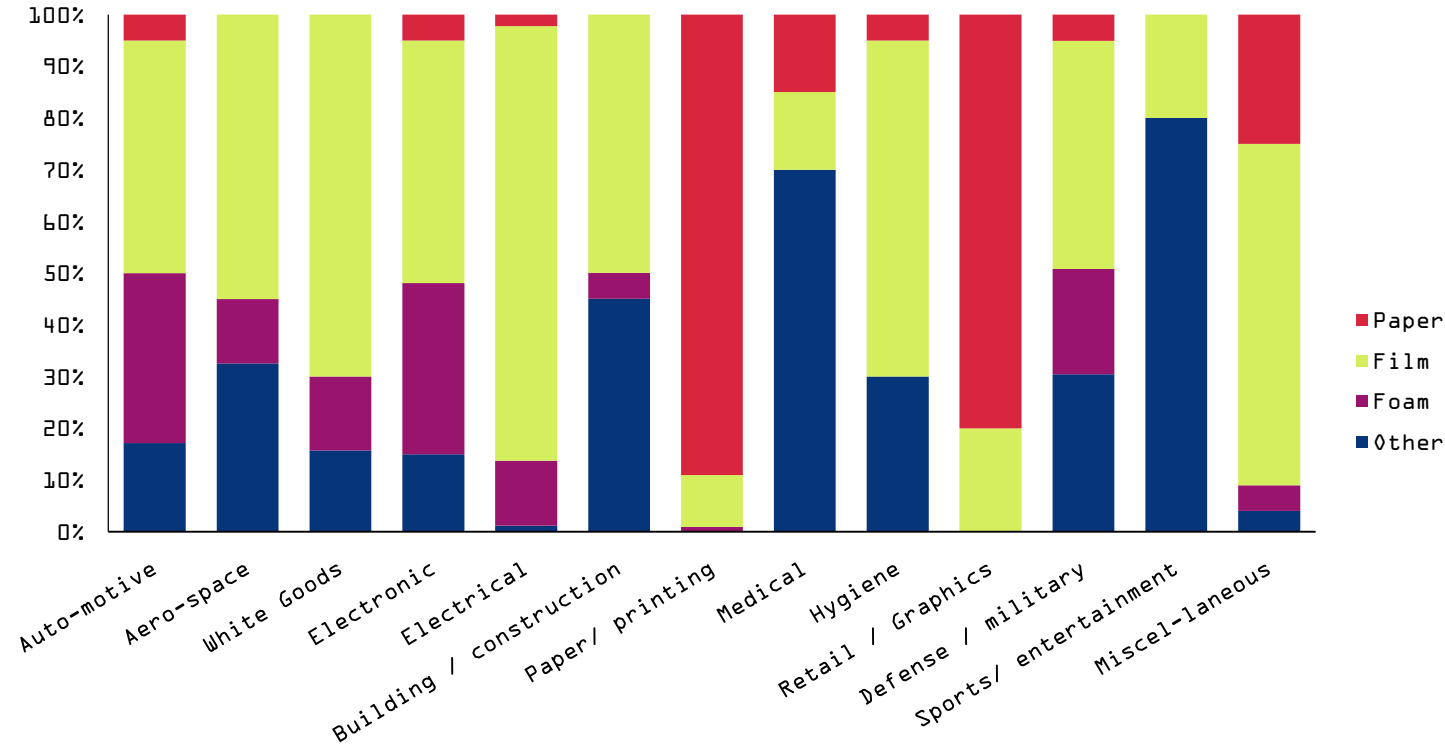


# GLOBAL SPECIALTY PRESSURE-SENSITIVE TAPE MARKET BY MATERIAL

- PVC
- PE
- PA
- PET
- PP
- Paper
- Foam
- Glass Cloth
- Metal
- Woven/Non-Woven



# GLOBAL SPECIALTY PRESSURE-SENSITIVE TAPE MARKET BY MATERIAL AND END-USE SEGMENT



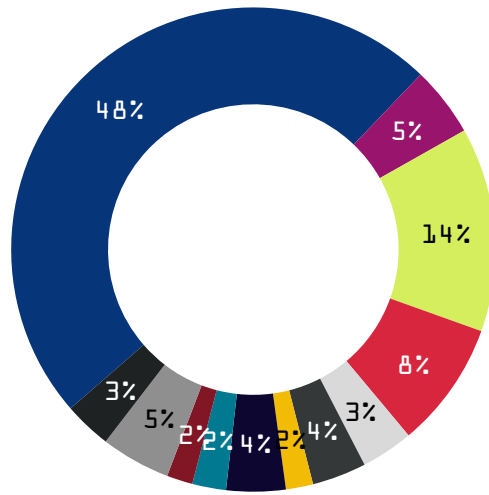


# RELEASE LINER MARKET & TAPE APPLICATIONS

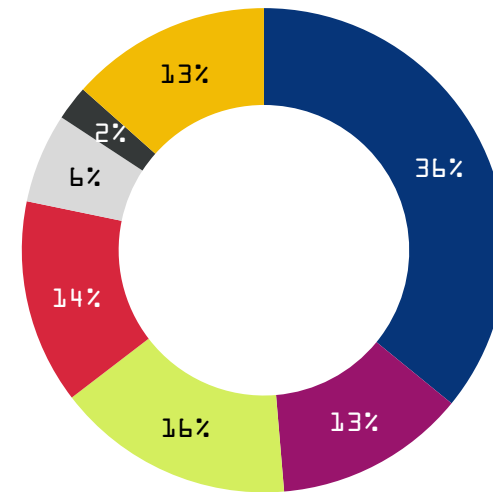


# GLOBAL RELEASE LINER MARKET

- Labelstock
- Graphic Films
- Tapes
- Hygiene
- Medical
- Building & Construction
- Composites
- Electronics
- Other Industrial
- Envelopes

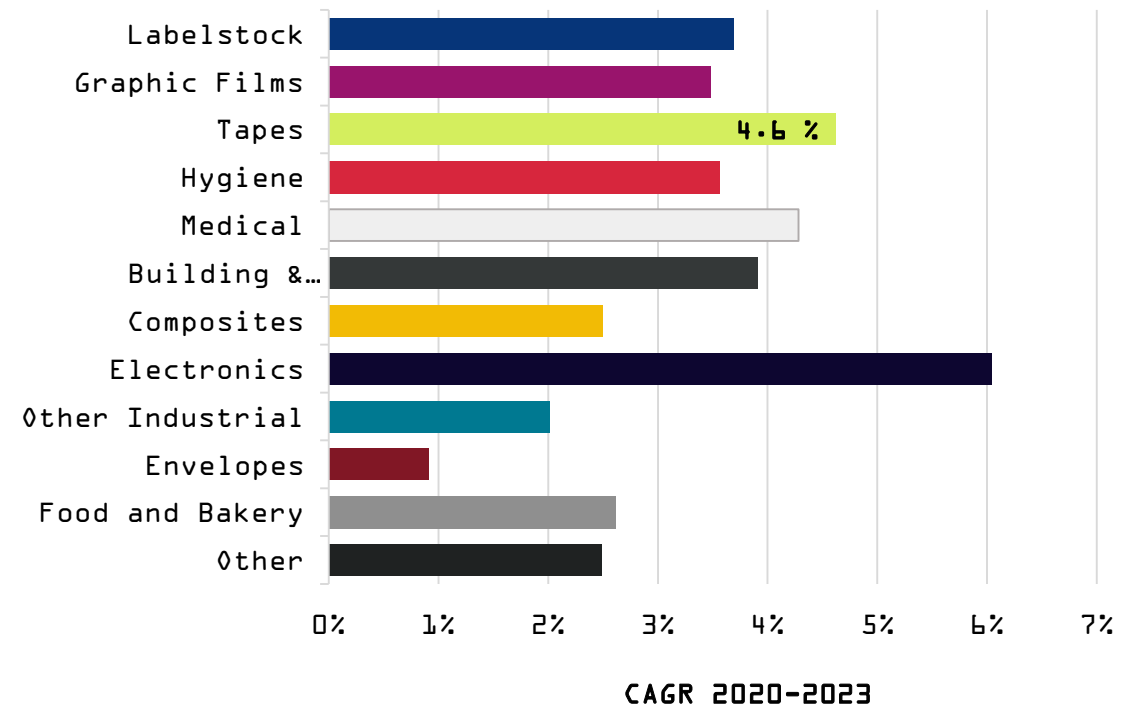
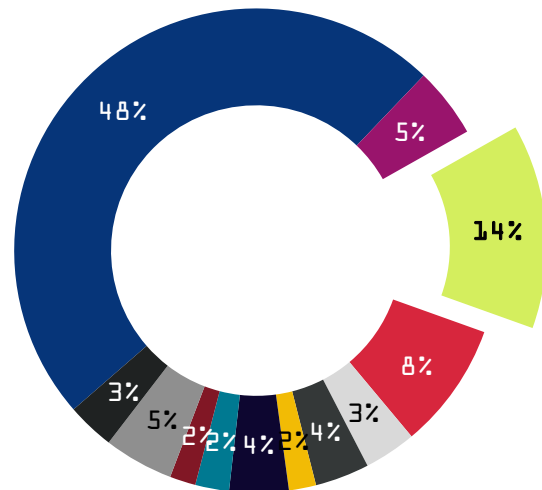


- Glassine/Calendered Kraft
- Clay Coated Paper
- Polyolefin Coated Paper
- Other Papers
- PE
- PP



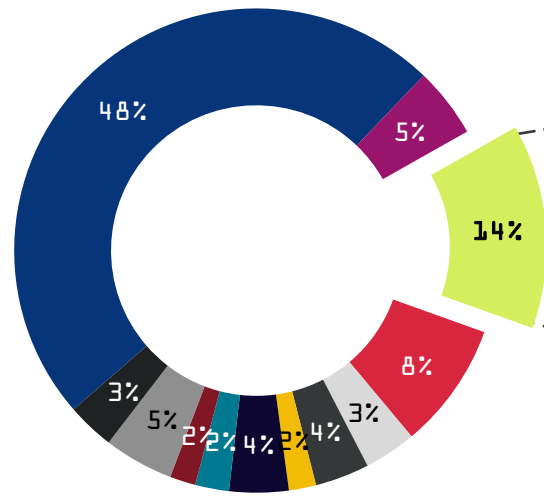
# GLOBAL RELEASE LINER MARKET GROWTH BY SEGMENT

- Labelstock
- Graphic Films
- Tapes
- Hygiene
- Medical
- Building & Construction
- Composites
- Electronics
- Other Industrial
- Envelopes

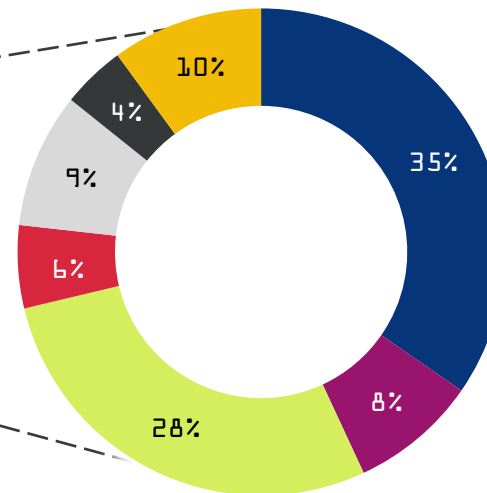


# GLOBAL PS TAPE RELEASE LINER MARKET

- Labelstock
- Graphic Films
- **Tapes**
- Hygiene
- Medical
- Building & Construction
- Composites
- Electronics
- Other Industrial
- Envelopes

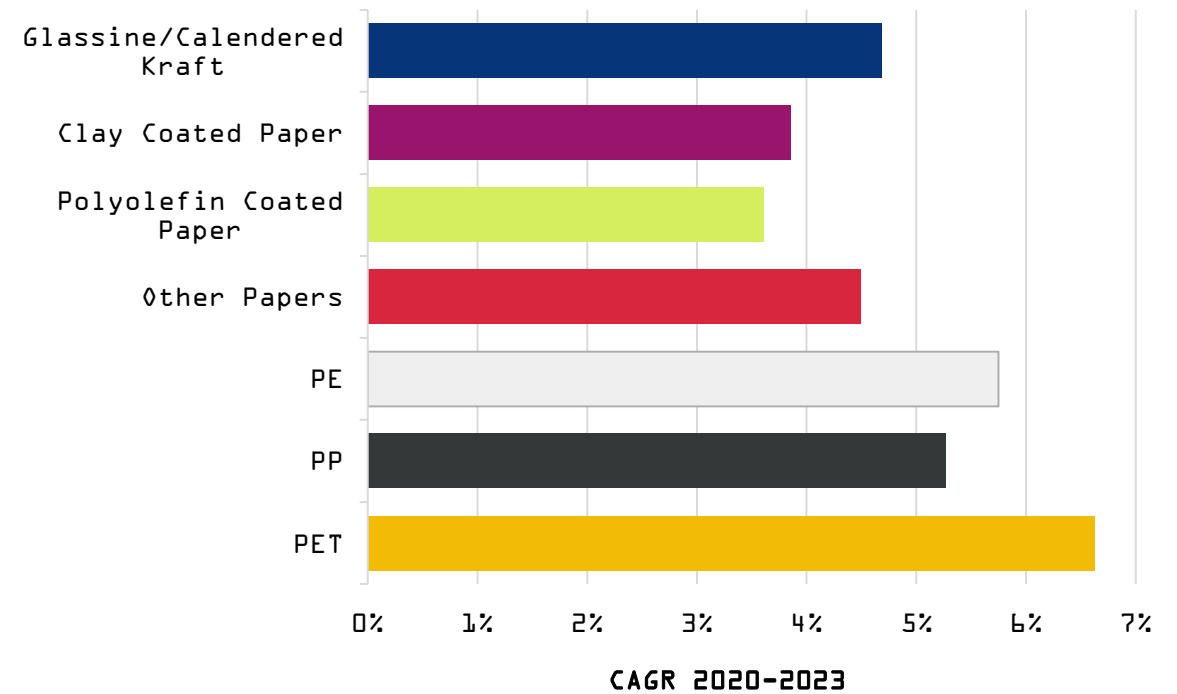
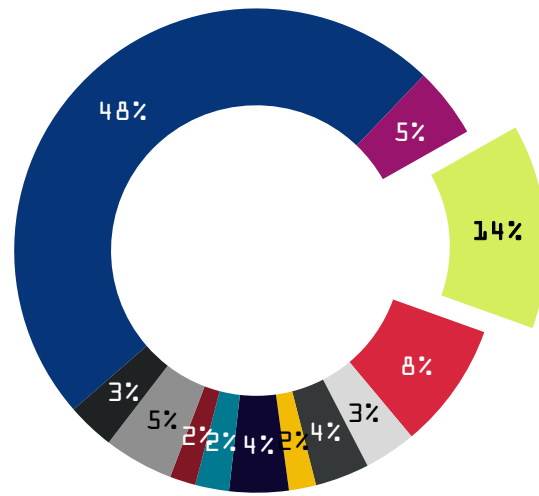


- Glassine/Calendered Kraft
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- Other Papers
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# GLOBAL PS TAPE RELEASE LINER MARKET

- Labelstock
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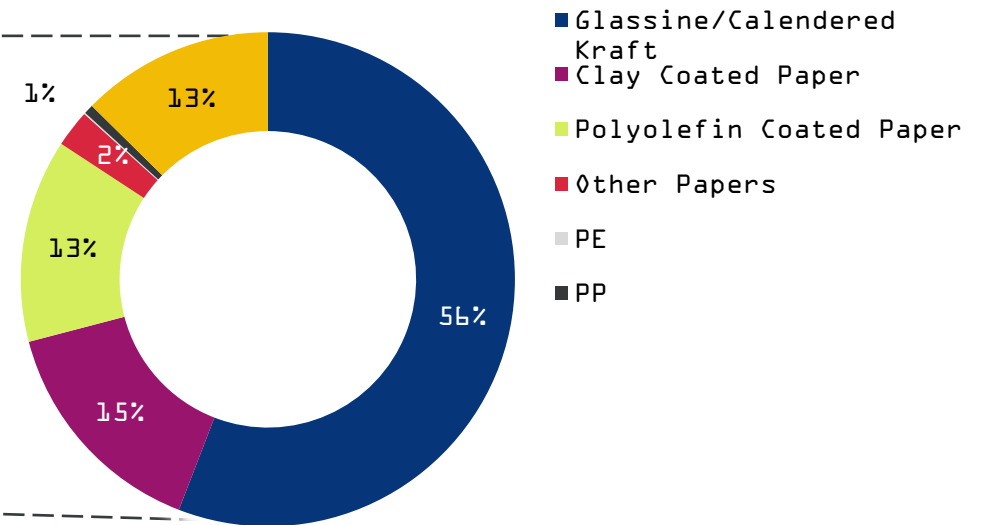
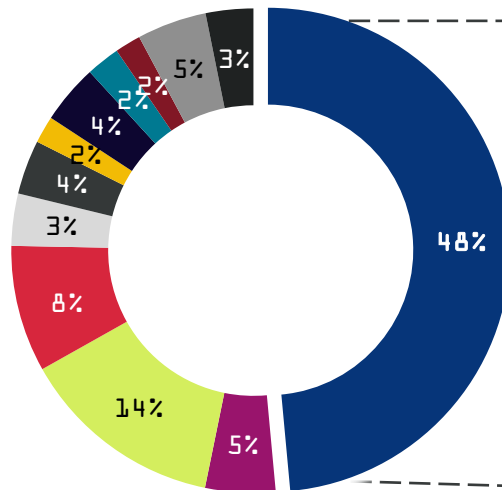
## SUSTAINABILITY & RECYCLING CASE STUDIES

*“THE SCALE OF TODAY’S ENVIRONMENTAL CHALLENGES  
IS UNPRECEDENTED, REQUIRING THE POWER OF  
COLLABORATION ACROSS THE VALUE CHAIN TO  
ACCELERATE THE PACE OF CHANGE AND FIND NEW  
ANSWERS”*

Renaë Kezar,  
Sr. Director, Global Leader of Sustainability  
Avery Dennison

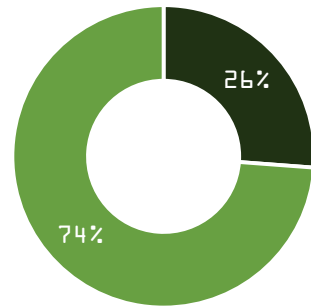
# 1) . LABEL MARKET

- Labelstock
- Graphic Films
- Tapes
- Hygiene
- Medical
- Building & Construction
- Composites
- Electronics
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- Envelopes

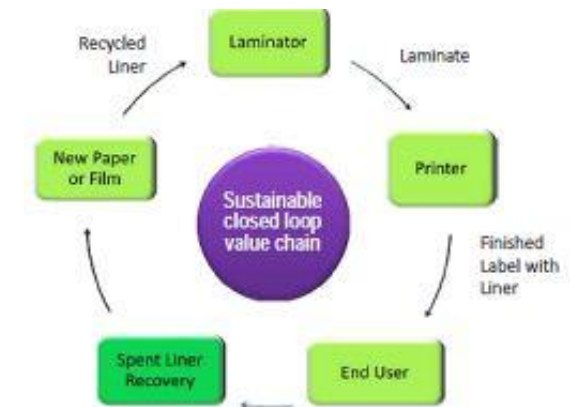
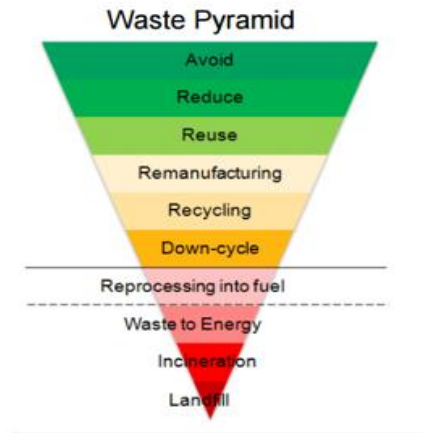
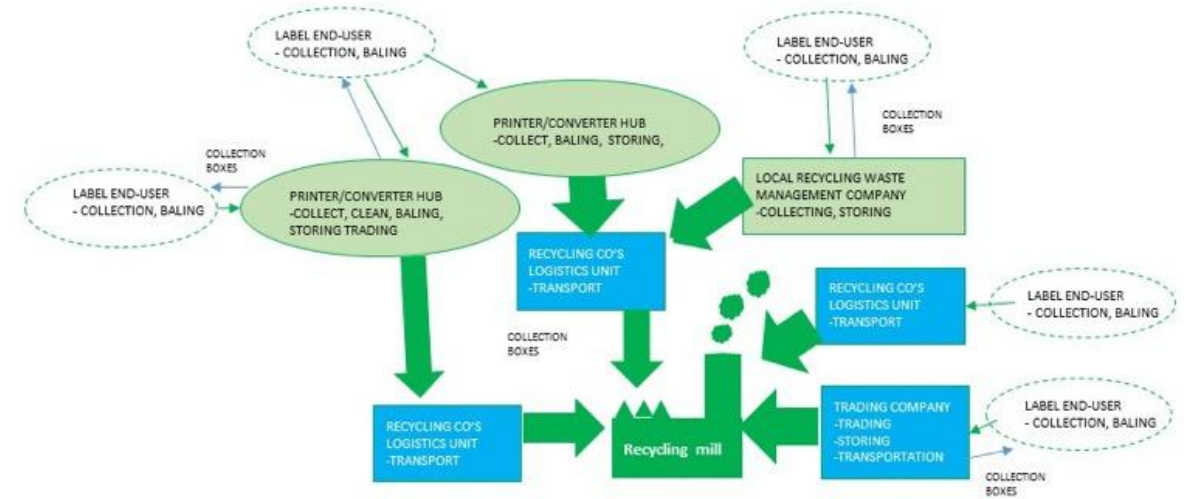


# LABEL RELEASE LINER AND MATRIX BY-PRODUCT

Release Liner Recycling Program

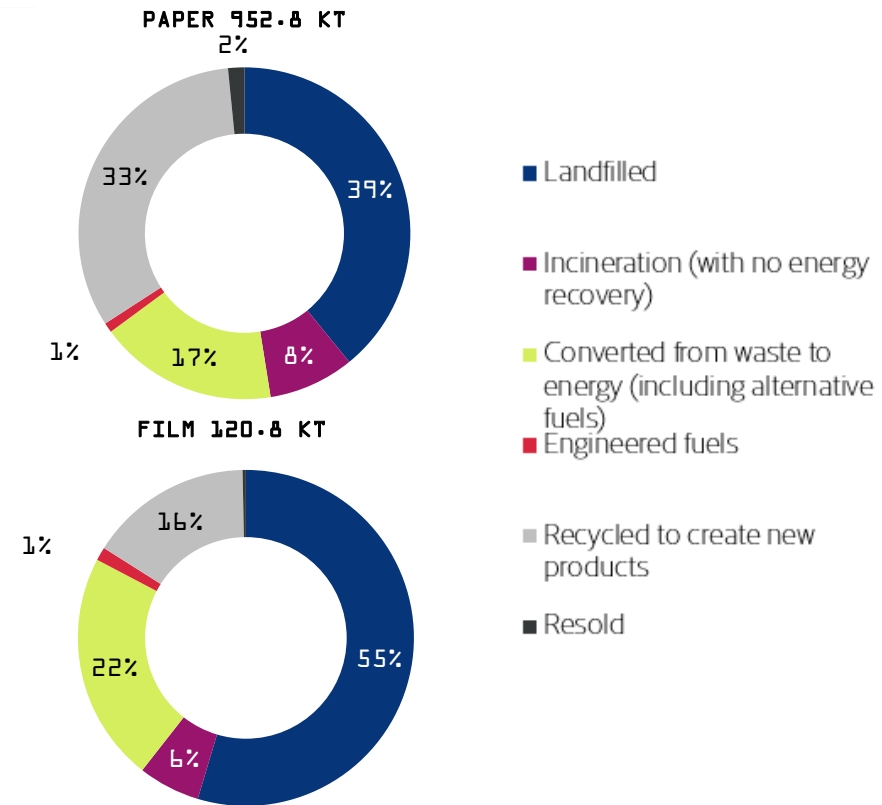


- Yes
- No

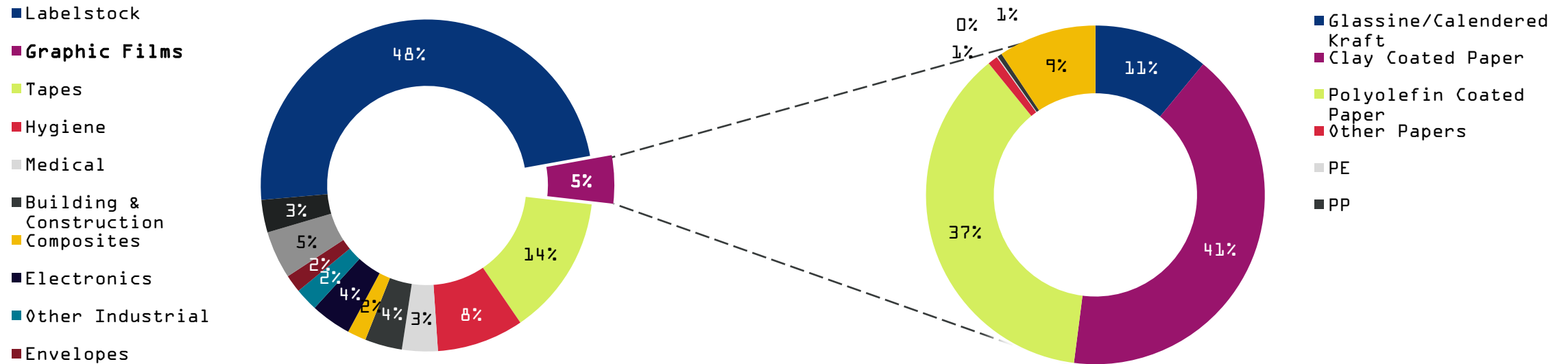




# LABEL MARKET RELEASE LINER BY-PRODUCT 2019

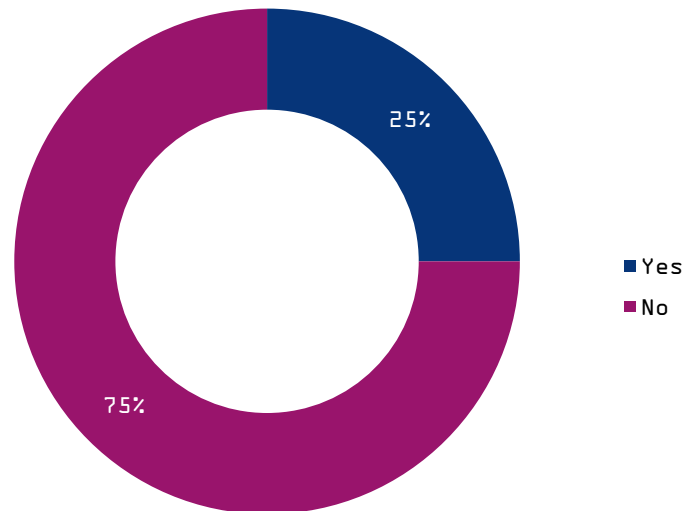


## 2). GRAPHIC FILMS MARKET

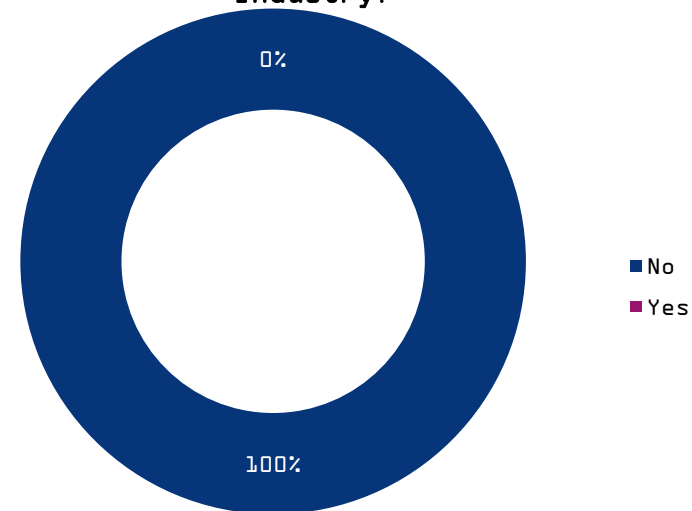


# GRAPHIC FILMS RELEASE LINER - SUSTAINABILITY & RECYCLING

Is release liner by-product separated from other waste?

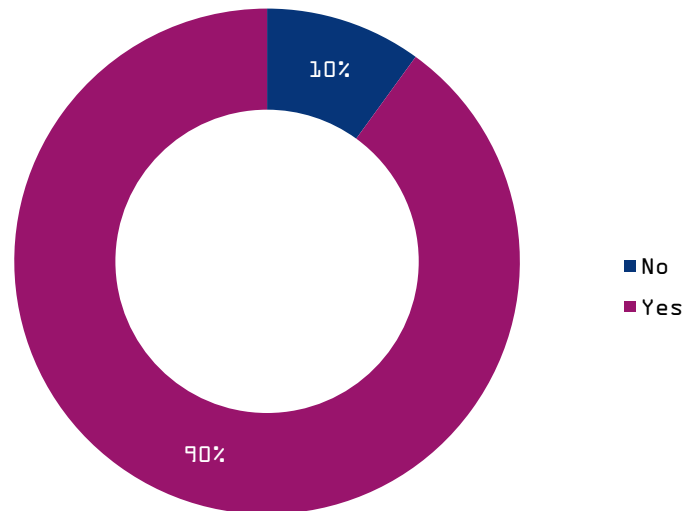


Are you involved in recycling/collection initiatives for graphic films release liner in the industry?

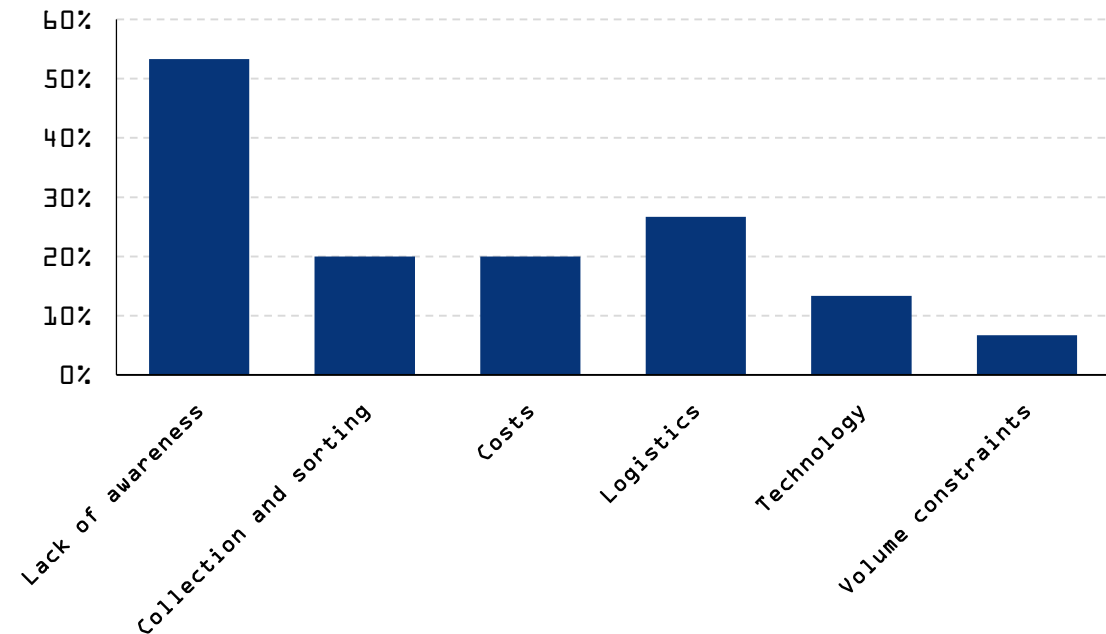


# GRAPHIC FILMS RELEASE LINER - SUSTAINABILITY & RECYCLING

If there were recycling/collection initiatives for graphic films release liner, would your company be interested in participating?



What are the challenges associated with recycling release liner?

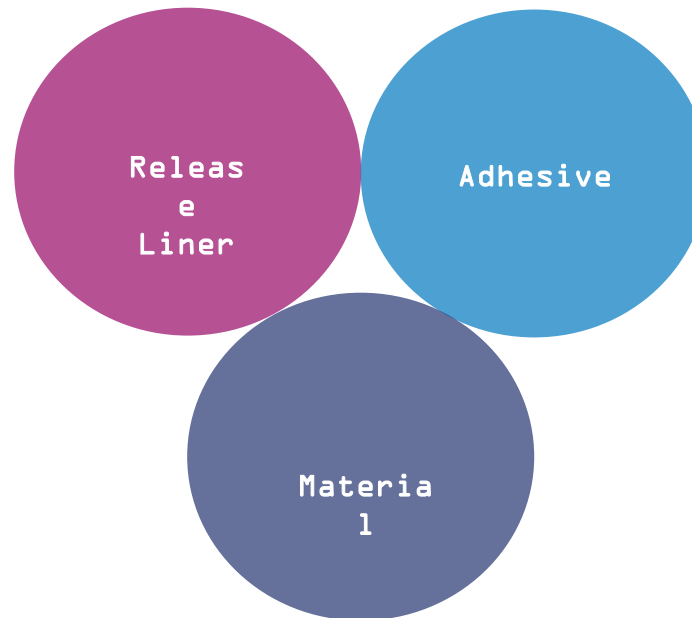


# GLOBAL SPECIALTY TAPE MARKET TRENDS AND DEVELOPMENT

- **Global Economy** - The outbreak and global spread of the COVID-19 virus and its ultimate impact on public health, human lives, and economic activity have created further uncertainty regarding the global economy's prospects.
- **Demographic Trend:** Declining birth rates, combined with increases in life expectancy, are leading to population aging. Aging puts pressure on healthcare systems globally, and creates demand for hygiene and medical supplies, as well as impacting social security systems and the provision of pensions.
- **High polarization** - On one hand the prices are driven down by low demanding applications of tapes. On the other hand, the high technology application where new adhesive and tape solutions are being developed to be used where tapes have not been used before.
- **Technology Trends** - The functionality of specialty tapes comes from the development of adhesives. New adhesive solutions that are formulated to deliver in extreme conditions like freezing, heat or damp will offer new opportunities to tapes.
- **Supply Chain trends** – Volatility of the cost of raw materials is driven by concentration and fewer suppliers and natural resources shortages. The industry is currently facing historical raw material cost increases.
- **Environmental issues** – Specialty tape end users are facing issues like sustainability, recyclability, corporate responsibility and demand for low-carbon products in their manufacturing. Also, the use of solvents are predicted to decline due to the environmental reasons as the water-based and hot melt are predicted to grow. In Europe specifically, the European Green Deal will lead to a host of new regulations that will likely impact the tapes industry.

# SPECIALTY TAPES - SUSTAINABILITY & RECYCLING

- Tape release liner users are fragmented; collection is challenging
- 28% is PCK liner; not as many readily available recycling options
- Focus on release liner recycling in the tapes industry is not as strong as in other segments (e.g. labels, graphics)



- Developments in the area of bio-based adhesives
- Where possible shift away from solvent-based adhesives

- Where performance allows increasing interest in paper-based tapes and/or fiber-based
- Performance remains most important requirement

**THANK YOU.**

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