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World Pressure Sensitive Tapes

Industry Study with Forecasts for **2016 & 2021**

Study #2883 | May 2012 | \$6100 | 406 pages



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INDUSTRY STRUCTURE

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Gains in PSA tape demand through 2016 will represent an improvement from the 2006-2011 period, with advances driven by an acceleration in manufacturing activity.

World demand to rise 5.6% annually through 2016

Global demand for pressure sensitive adhesive (PSA) tapes is projected to rise 5.6 percent per year through 2016 to 43.5 billion square meters, valued at \$37 billion. This represents an improvement from the 2006-2011 period, which was negatively affected by the recent global economic slowdown. In particular, advances will be driven by an acceleration in manufacturing activity.

Demand in the dominant carton sealing tape segment will be bolstered by an upswing in the processed food and beverage manufacturing sector, which represents the largest single user of corrugated box packaging. Carton sealing tape sales will continue to outpace box demand as tapes capture additional market share from alternative box sealing solutions such as glue. Demand for masking tapes will see a significant acceleration, boosted by strong improvements in building construction expenditures, including architectural paint projects. An acceleration in motor vehicle production, another important masking tape market, will further contribute to demand gains.

Good opportunities will also be found in the electrical and electronic, double-sided, and medical tape segments, though growth in these applications will stem from relatively small bases. Advances, especially for electronic types, will be fueled by fast growing end-use

World Pressure Sensitive Tape Demand, 2016 (43.5 billion square meters)



Asia/Pacific
52%

North America
20%

Western Europe
14%

Other Regions
14%

photo: Antalis-McNaughton

markets. Double-sided bonding tapes will further supplant alternative joining and sealing methods in many industrial applications, while PSA medical and surgical tapes are expected to continue to replace traditional bandages.

Asia/Pacific region to see fastest market gains

The Asia/Pacific region will see the most rapid gains and remain the largest regional market, due to its large manufacturing industries. Central and South America, Eastern Europe, and the Africa/Mideast region will also experience healthy growth, though advances in these areas will stem from much lower base levels (collectively, these three

regions only accounted for 15 percent of global pressure sensitive tape demand in 2011). Overall, the fastest growth will be seen in Asia, specifically in India, China, and Indonesia. In particular, China alone will account for close to half of global pressure sensitive tape market volume gains between 2011 and 2016.

In contrast, advances will be below average in North America and Western Europe, where markets are more established. Nonetheless, good opportunities will still be found in developed countries, especially for technical tapes, due to the development of new specialty applications such as electrically conductive adhesive tapes for telecommunications equipment.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Market Trends

Through 2016, demand for pressure sensitive tapes in India is expected to advance at a steady pace, with total demand projected to reach 1.5 billion square meters by 2016, representing the fastest growth rate in the region. The rapidly growing manufacturing sector is expected to propel demand for pressure sensitive tapes, in tandem with the still growing population and rising disposable income, and for consumer products such as office supplies, adhesives, and disposables. Gains in the rising middle class population. However, faster advances are precluded by the low levels of personal income and generally undeveloped state of major end-use industries.

Carton sealing tapes account for a lower share of the aggregate tape market in India than in many other Asian countries -- 70 percent in 2011. This reflects a number of factors, including the country's underdeveloped consumer nondurables market, poor transportation/distribution infrastructure, and limited foreign trade in comparison to regional neighbors such as China and Vietnam. Exports of manufactured goods account for only a very small proportion of India's GDP, and include a disproportionately large share of high value, low volume (and hence less box intensive) items like diamonds. Still, over the past decade exports of items such as readymade garments, oilmeals, basmati rice, tobacco, spices, nuts, poultry, and dairy grew strongly, bolstering demand for boxes and carton sealing tapes.

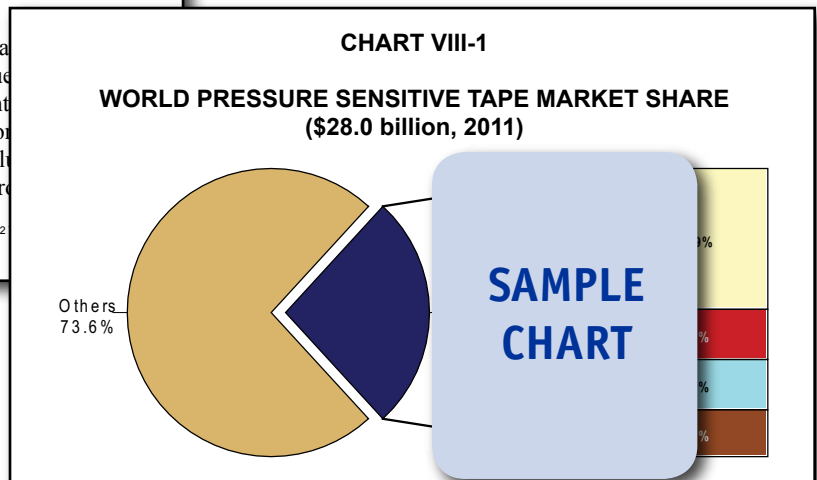
Furthermore, production of processed foods and beverages is expanding at a robust pace, will accelerate through 2016, fueling demand for carton sealing tape sales. Demand growth will reflect both the continued expansion of competitive carton sealing media and the factor of demand for corrugated packaging in general. The latter includes the economy, rapid growth in industrial output and consumer products.

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TABLE VI-7
INDIA: PRESSURE SENSITIVE TAPE SUPPLY & DEMAND
 (million square meters)

Item	2001	2006	2011	2016	2021
Population (mil persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2010\$)					
% manufacturing					
Manufacturing Value Added (bil 2010\$)					
square meters/capita					
square meters/mil \$ GDP					
square meters/000\$ MVA					
Pressure Sensitive Tape Demand					
+ net exports					
Pressure Sensitive Tape Shipments					



Sample Profile, Table & Forecast

TABLE VI-8
INDIA: PRESSURE SENSITIVE TAPE
SALES BY TYPE & MATERIAL
 (million square meters)

Item	2001	2006	2011	2016	2021
Asia/Pacific Pressure Sensitive Tapes % India					
Pressure Sensitive Tape Demand					
By Type:					
Carton Sealing					
Masking					
Electrical & Electronic					
Double-Sided					
Medical					
Other					
By Material:					
Polypropylene					
PVC					
Paper					
Other					



COMPANY PROFILES

Sicad Group SpA
 Via caduti Liberazione, 57
 21040 Uboldo
 Italy
 39-2-964-121
 http://www.sicad.it

SAMPLE PROFILE

Annual Sales:
 Employment:

Key Products: consumer, automotive repair, printing, stationery, painting and coating, and medical applications

Sicad Group is a manufacturer of adhesive tapes. The Company is privately held.

Sicad Group is involved in the worldwide tape industry through the production of pressure sensitive tapes, which are sold under the EUROCEL brand name to customers in the construction, consumer, automotive repair, printing, stationery, painting and coating, and medical markets. These tapes include single- and double-sided varieties that utilize polyester, low-density polyethylene (LDPE), high-density polyethylene, biaxially oriented polypropylene (BOPP), nonwoven fabric, kraft or crepe paper, polyethylene foam, aluminum foil, polyvinyl chloride and cloth backing materials. EUROCEL tapes are also available with foil, film, cloth or fiberglass reinforcing layers that provide enhanced long-term protection and durability. Sicad Group makes tapes with rubber, silicone, or water- or solvent-based acrylic adhesives.

Specific EUROCEL tapes include MSK 180, EUROGRAPHIC, 920 PE and 724 PVA varieties. EUROCEL MSK 180 masking tapes

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“In 2011, demand for pressure sensitive tapes in India totaled 1.1 billion square meters, representing seven percent of the market in the Asia/Pacific region. Due to the country’s vast population, the lack of infrastructure, and the relatively underdeveloped states of many industries, India’s per capita tape consumption will remain among the lowest in the world. Nonetheless, pressure sensitive tape demand will continue to be fueled by rapid development in the country’s manufacturing sectors.”
 --Section VI, pg. 169

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OTHER STUDIES

Corrugated & Paperboard Boxes

US demand for corrugated and paperboard boxes is forecast to increase 2.3 percent annually to \$36.5 billion in 2016. Corrugated and solid fiber boxes will remain the dominant segments and grow the fastest. Food and beverages will remain the largest market, while nonmanufacturing and durable goods markets lead gains. This study analyzes the \$32.5 billion US corrugated and paperboard box industry, with forecasts for 2016 and 2021 by material, product and market. The study also evaluates company market shares and profiles industry players.

#2868 March 2012 \$5100

World Aseptic Packaging

World demand for aseptic packaging is projected to grow 9.1 percent annually to \$35.8 billion in 2015. India and China will experience the fastest increases in demand. Gains in the US will reflect the broadening aseptic filling requirements for liquid pharmaceuticals. Beverages will remain the dominant market worldwide. This study analyzes the \$23.2 billion world aseptic packaging industry, with forecasts for 2015 and 2020 by product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry competitors.

#2859 March 2012 \$5900

Protective Packaging

Protective packaging demand in the US is projected to increase 5.0 percent annually to \$5.9 billion in 2016. The increasing popularity of Internet shopping will benefit protective mailers, air pillows and bubble packaging. A recovery in manufacturing will spur gains for foam and molded pulp protective packaging. This study analyzes the \$4.6 billion US protective packaging industry, with forecasts for 2016 and 2021 by function, market and product. The study also evaluates company market share and profiles industry players.

#2839 January 2012 \$5100

Stretch & Shrink Film

US demand for stretch and shrink film is forecast to rise 3.3 percent annually to \$2.4 billion in 2015. Stretch film will remain the dominant segment, with stretch hoods growing the fastest. Shrink film demand growth will outpace gains in stretch film based on its high clarity and excellent print capabilities, greatly enhancing product marketability. This study analyzes the \$2.0 billion US stretch and shrink film industry, with forecasts for 2015 and 2020 by type, market, application and resin. The study also evaluates company market share and profiles industry players.

#2830 December 2011 \$4800

World Labels

World demand for labels will rise 5.2 percent annually through 2015. Pressure sensitive labels will remain the largest type and continue to supplant glue-applied labels. The Asia/Pacific region will grow the fastest and remain the largest market, due to its large manufacturing industries. This study analyzes the 40.1 billion square meter world label industry, with forecasts for 2015 and 2020 by application method, material, printing technology, market, world region and for 19 countries. The study also evaluates company market share and profiles industry participants.

#2808 October 2011 \$6100

About The Freedonia Group

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